



Introduction

This supplement adds to the information provided in the [SAP Concur Quick Start Guide for Travelers](#) and [SAP Concur Quick Start Guide for Approvers](#). You can also find a wealth of introductory information in the [SAP Concur User Guides and Demonstrations](#). If you are using an online version of this supplement, selecting the links in it will take you directly to other resources. If not, simply copy-paste the URLs provided at the end of this supplement into your web browser.

Note: For best results, use the Chrome browser to access SAP Concur.

Proxies vs. Delegates

Proxies and Delegates are two very different roles, though they do have some similarities. For example, although they both work with trip requests and expense reports for someone else, what they can actually do in those documents is very different.

1. **Proxy:** Proxies can handle documents for all members of an entire group (a.k.a., an organization); however, they do have limitations to what they can accomplish for others:

- a. They cannot make reservations for others, so Proxies are limited in the scope of services they can provide to Travelers.
- b. They cannot approve documents, so they cannot serve as backup Approvers.

They are, however, well suited to serve an organization's help desk function.

2. **Delegate:** A Delegate is a good choice to serve in two positions:

- a. They can be allow to fully assist Travelers as a travel clerk, NDEA, or a Director's administrative assistant, as needed.
- b. They can serve as a temporary (up to 180 days) replacement for an Approver who is away from the office for any reason (e.g., TDY, leave). An Approver Delegate must meet the same requirements as any other Approver, which means they must have the Approver role selected in their SAP Concur profile, must have a DD Form 577 on file, and must take all required Certifying Officer Legislation training.



Appointing a Proxy or Delegate

Appointing a Proxy requires a permission level not regularly provided to local organizations. If you need to appoint a Proxy, contact your Component Coordinator, who will pass word up to the DTMO to request Proxy appointment.

There are two ways to appoint a Delegate:

1. Any Traveler or Approver can select their own Delegate to handle their documents for them. However, they cannot grant the Delegate permission to submit expense reports on their behalf.
2. A Travel Manager can assign a Delegate to an individual Traveler or Approver – and allow them to submit expense reports, if desired.

Start Working as a Proxy or Delegate

Whether you are a Proxy or a Delegate, you essentially work the same way in SAP Concur.

1. Log into [SAP Concur](#). The SAP Concur home screen opens. For more information about that screen, see the [SAP Concur Supplement: Home Page Features](#).
2. If prompted, or per Component directives, review and update your profile. See the [SAP Concur Supplement: Profile Updates](#).
3. On the SAP Concur home screen, select **Profile** in the upper right corner. A drop-down menu appears. This action is visible in Figure 1.

Note: At this point, everything else on the home screen relates to your own travel documents. See the [SAP Concur Quick Start Guide for Travelers](#) for more information.

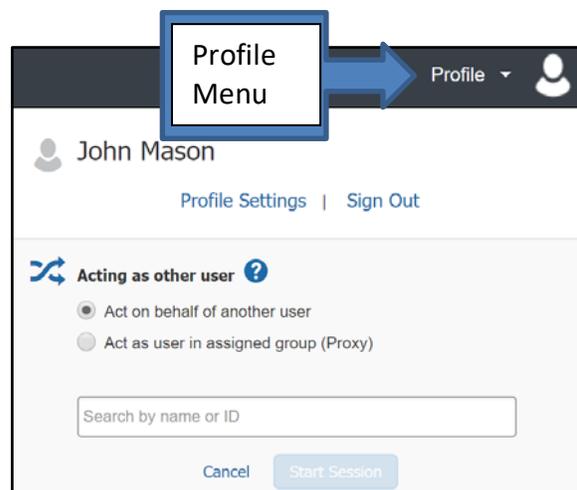


Figure 1: Home Screen with the **Profile** Drop-Down Menu Open



**Start
Working as
a Proxy or
Delegate
(continued)**

4. In the **Acting as other user** section (see Figure 1), to start working as a Proxy, select the **Act as user in assigned group (Proxy)** radio button. To start working as a Delegate, select the **Act on behalf of another user** radio button instead. You will only see both radio buttons if you are assigned as both a Proxy and a Delegate.
5. Select the **Search by name or ID** field to see a list of people whose documents you can access (see Figure 2).
6. Select the person whose documents you want to work with. The selected person's name populates the **Search by name or ID** field (see Figure 2).

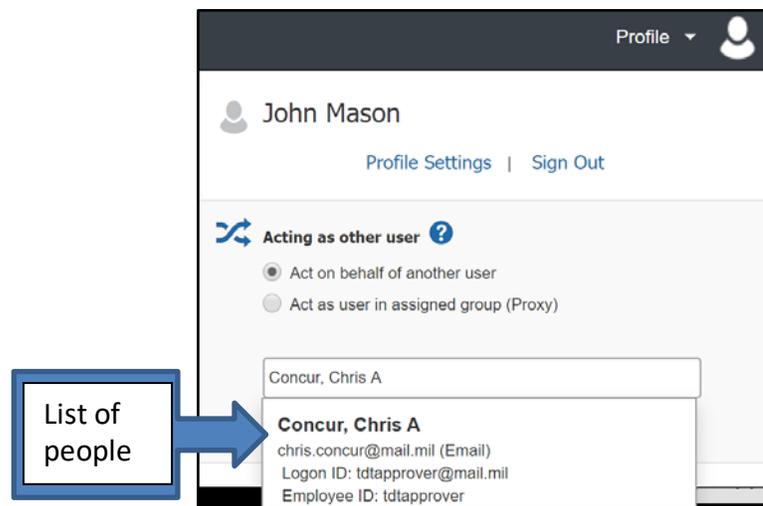


Figure 2: Other User Selected

7. Select **Start Session** (this button is visible in Figure 1). The home screen refreshes to display the selected person's documents. Also, the **Profile** icon in the top right corner of the screen changes (see Figure 3) to a green icon that shows you are now working as a Proxy or Delegate, and for whom.



Figure 3: Proxy or Delegate Icon

At this point, you can access the selected person's documents.



Start Working as a Proxy or Delegate (continued)

Note: Your permissions determine which document types you can access and what you can do in them. For example, you may be able to work only with trip requests or expense reports, or you may be able to access both. You may be able to only edit those documents or submit them as well. If you need access to a document type or take an action the system won't currently allow, see the section **Appointing a Proxy or Delegate** (above).

Switch to Another Person's Documents

To start working for a different person, select the green **Acting As <name>** icon. When the drop-down menu (Figure 4) opens, search for and select the new person in the **Search by name or ID** field, then select **Start Session**. The screen refreshes to display the new person's travel documents.

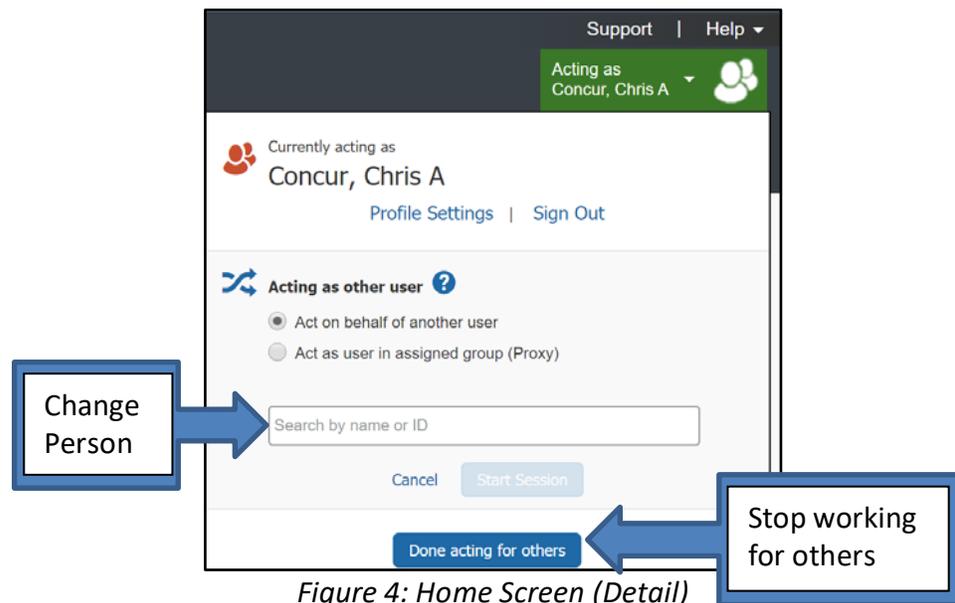


Figure 4: Home Screen (Detail)

Stop Working as a Proxy or Delegate

When you have finished working with other people's documents, select the green **Acting As <name>** icon. When the drop-down menu opens, select **Done acting for others** (see Figure 4). The screen refreshes to display your own travel documents again.



Mandatory Document Reminder

The DoD Financial Management Regulation (DoD FMR) requires all Travelers to prepare their own claims for payment. When someone else will ultimately submit the claim for them, they will complete and sign one of the following forms:

- Department of Defense (DD) Form 1351-2 upon completion of TDY travel.
- Optional Form (OF) 1164 following any official travel in the local area.

A Delegate or Proxy, must attach the Traveler's signed form to the expense report before submitting it. When you begin the expense report submission process, SAP Concur reminds you of that requirement on the Final Review screen (see Figure 5).

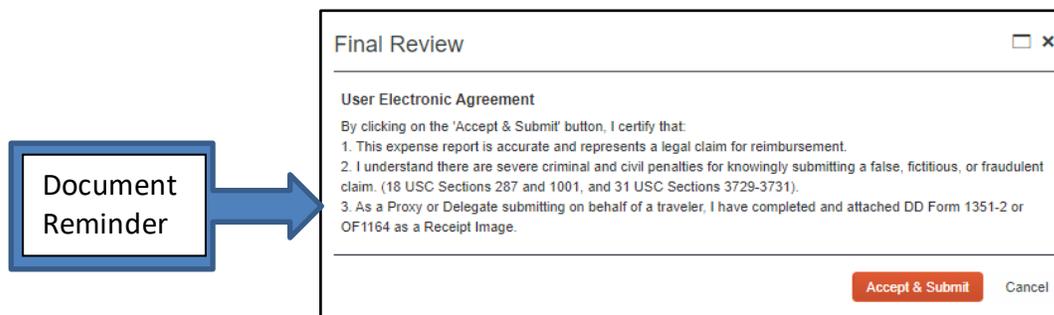


Figure 5: Mandatory Document Reminder

Before selecting **Accept & Submit**, you should always make sure you have attached the appropriate form.

Additional Resources

The items on this list provide the URLs for additional information you may find useful. Some of them are mentioned elsewhere in this guide.

1. SAP Concur-created User Guides and Demonstrations
<https://www.concurtraining.com/toolkit/en/expense/end-user/ui02>
2. SAP Concur direct link
<https://dodtravel.concursolutions.com>

In addition, you can find many helpful user guides and other informational papers:

- On the DTMO website's **Defense Travel Modernization Prototype** screen at <https://www.defensetravel.dod.mil/site/dtmprototype.cfm>.
- By logging onto SAP Concur at the link in #3 above, then selecting **Help** in the upper left corner of the screen, then **Training** on the drop-down menu.