CONCUR | ADDING A DELEGATE

OVERVIEW

A Delegate is an individual designated in Concur to assist with tasks such as: creating and submitting Travel Requests, creating Expense and Company Billed Statement Reports, approving Travel Requests and approving Expense and Company Billed Statement Reports on behalf of another Concur user.

> **NOTE:** To allow another user to book Travel on your behalf, within Concur, the traveler must identify the user as a Travel Assistant. Refer to the Navigation and Profile Setup reference document for additional Travel Assistant assignment information.

There are three (3) types of delegates:

1. A **Preparer** Delegate - can prepare/submit requests and prepare expense reports on behalf of a user.

> **NOTE: (1)** Preparer delegates cannot submit requests containing cash advances. **(2)** Preparer delegates will notify the traveler when an expense or Company Billed Statement report is ready for review and submission, however they will NOT be able to submit the expense or Company Billed Statement report on behalf of a traveler.

2. An **Approver** Delegate - can approve Requests or Reports on behalf of a user. (To be an Approver Delegate, you must already have the approver role).

> **NOTE:** An Approve Delegate can be assigned on a temporary or permanent basis.

3. A **Previewer** Delegate - can review submitted Requests and Reports on behalf of an Approver, however they will not be able to approve these Requests or Reports.

> ⑨ **TIP:** Refer to the Working as a Delegate reference document for additional details.

HOW TO ADD A DELEGATE

The Travel Request, Expense (including Company Billed Statement Report) Report modules within Concur share delegates. Therefore, by assigning permission(s) to a delegate, you are assigning permissions for another user to access and assist with your Concur Profile, Travel Requests, Expense and Company Billed Statement Reports.

Below is a list of the steps you will take in your Concur profile to add a preparer or approver delegate.

1. Navigate to any web browser.

2. Access Concur by clicking on the following: Concur SSO.

3. From the Concur homepage, click **Profile** and then click **Profile Settings**.
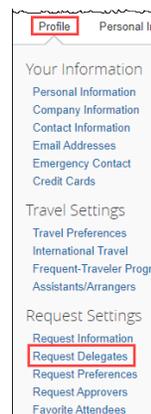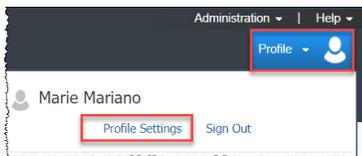
4. On the left of your screen select **Request Delegates.**

5. Click **Add** and then type in your search information.

> ⑨ **TIP:** You can search by employee name, email address, employee id or login id.

6. *Once the name you are searching for appears, verify all the information is correct. A filtered dropdown list of matching names displays.*

7. Click on the desired name in the dropdown.
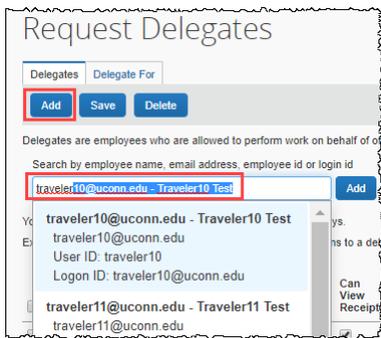
8. Click the check boxes to assign the permission you would like to give to each delegate.
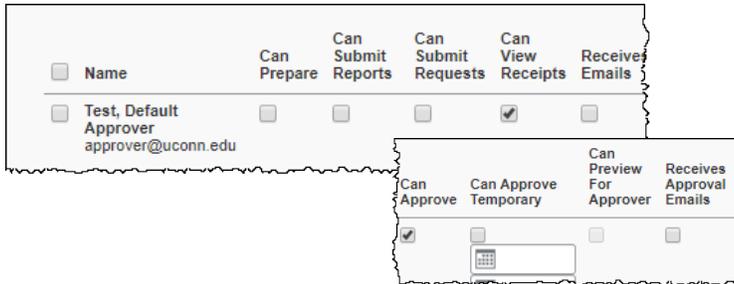
Below is a table listing available permissions and a brief description of each.

Delegate Permission	Permission Description
Can Prepare	This option allows a delegate to prepare Reports on your behalf.
	NOTE: Expense and Company Billed Statement reports cannot be submitted by a delegate, unless the traveler is no longer a UConn employee.
Can Submit Reports	This option is recommended. This option allows a delegate to trigger any audit rules that may need to be resolved before the Traveler submits the Expense or Company Billed Statement Report.
	NOTE: A Delegate must notify a traveler when a report is ready to be submitted by emailing the traveler outside the system.
Can Submit Requests	This option allows a delegate to create and submit Travel Requests on your behalf.
	NOTE: Delegates can submit requests on a user's behalf if the request does not contain a Cash Advance.
Can View Receipts	This option is recommended for all delegates and will automatically be marked with a check when selecting the Can Prepare permission for a delegate. This allows a delegate to view your receipt store, e-receipts, receipts images, etc.
Receives Emails	This option will copy a delegate on all emails generated by Concur addressed to you (the traveler).
Can Approve	If available, this option allows a delegate to approve requests on your behalf permanently.
Can Approve Temporary	If available, this option allows a delegate to approve requests or expenses temporarily – based on a timeframe you indicate (usually assigned when the approver will be out of office with no access to approve in Concur themselves).
Can Preview for Approver	This option allows a delegate to review all Requests, and Reports submitted to you (the approver).
Receives Approval Emails	This option will copy a delegate on all approval emails generated by Concur addressed to you (the approver).

9. Click **Save**. Once you click save, the next time your delegate(s) log into Concur, they will be able to act as your delegate and perform the tasks you have granted them permission for.

Refer to the Working as a Delegate reference document for more details on how to work as a delegate.

ADDITIONAL SUPPORT

For help with Concur, contact travel@uconn.edu.

For additional reference material, refer to the Training and Resources page located on the Travel Services page.