



How to add a delegate in Concur

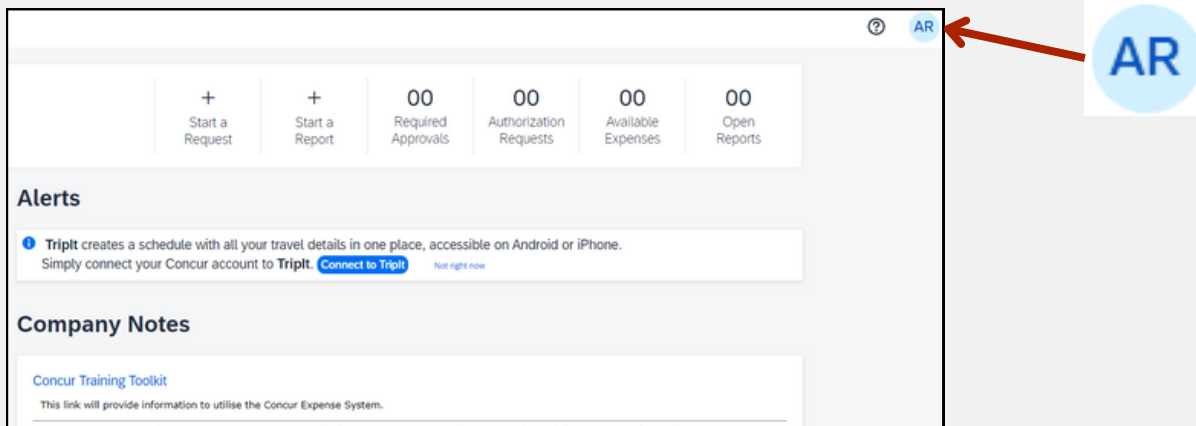


You can assign another user—called a delegate—to act on your behalf in Concur. If your agency has a travel coordinator or administrative assistant who's in charge of travel, you can assign them to be your delegate for creating and modifying travel requests, reimbursement requests, and p-card reconciliations.

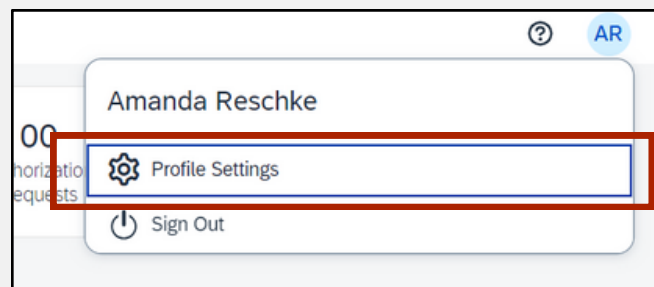
If you're an approver, you can assign a delegate to approve on your behalf. However, your delegate needs to have similar job responsibilities as you. For example, if you're a division director, your delegate should be a deputy director or someone similar.

Start by adding a delegate

In Concur, click the blue circle with your initials in the upper-right corner.



Select **Profile Settings**.



SAP Concur Profile

Profile Personal Information Change Password System Settings Concur Mobile Registration

Your Information
 Personal Information
 Company Information
 Contact Information
 Email Addresses
 Emergency Contact
 Credit Cards

Travel Settings
 Travel Preferences
 International Travel
 Frequent-Traveler Programs

Request Settings
 Request Information
 Request Delegates
 Request Preferences
 Request Approvers
 Favorite Attendees

Expense Settings
 Expense Information
 Expense Delegates
 Expense Preferences
 Expense Approvers
 Vehicle Configuration
 Favorite Attendees

Profile Options
 Select one of the following to customize your user profile.

Personal Information
 Your home address and emergency contact information.

Company Information
 Your company name and business address or your remote location address.

Credit Card Information
 You can store your credit card information to avoid having to re-enter it each time you make a purchase.

Travel Vacation Reassignment
 Going to be out of the office? Configure your backup travel manager.

Request Preferences
 Select the options that define when you receive notifications. Prompts are pages that appear when you perform a certain action, such as Submit or Print.

Vehicle Configuration
 Vehicle Configuration

Concur Mobile Registration
 Set up access to Concur on your mobile device

You're at the Profile Options screen.

In the menu on the left side, click **Request Delegates** or **Expense Delegates**. Either option will take you to the same screen.

You're at the Request Delegates or Expense Delegates screen. In the Delegates tab, click the blue button **Add**.

Personal Information Change Password System Settings Concur Mobile Registration Travel Vacation Reassignment

Your Information
 Personal Information
 Company Information
 Contact Information
 Email Addresses
 Emergency Contact
 Credit Cards

Travel Settings
 Travel Preferences
 International Travel
 Frequent-Traveler Programs

Request Settings

Request Delegates

Delegates Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.
 Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/> Name	Can Prepare	Can Book Travel	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
No records found.									

Search for the employee who will be your delegate.

Type their name, email address, or employee ID number in the search field.

Request Delegates

Delegates Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

Add Cancel

Expense and Request share delegates. By assigning permissions to a delegate, you are

<input type="checkbox"/> Name	Can Prepare	Can Book Travel	Can View Receipts	Can Use Reporting
No records found.				

Request Delegates

Delegates

Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

Keesha Calloway Add Cancel

Ex: Keesha Calloway @utah.gov

Employee ID: Logon ID: @utah.gov

Can Use Reporting Receives Emails

No records found.

The employee's information will auto populate. Click on the person who will be your delegate.

Give permissions for creating requests and reconciliations



If you're a traveler or p-card holder, whatever permissions you give your delegate will apply to everything: travel requests, reimbursement requests, and p-card reconciliations.

Once you've added your delegate, you'll see them in your list. Now you can check the boxes to give them permissions.

Request Delegates

Delegates

Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can View Receipts	Can Use Reporting	Receives Emails
<input type="checkbox"/>	Calloway, Keesha @utah.gov	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Can Prepare

☒

Checkmark the box **Can Prepare** to give your delegate permission to create, edit, and review travel requests, reimbursement requests, and p-card reconciliations.



If you checkmark **Can Prepare**, the box **Can View Receipts** will be checked automatically. Keep it checked. This box gives your delegate permission to view and add receipts to your requests or reconciliations.

	Can Prepare	Can Book Travel	Can View Receipts	Can Use Reporting	Receives Emails
Keesha @utah.gov	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Can Book Travel

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Checkmark the box **Can Book travel** to give your delegate permission to book your travel using the booking tool.

Can Use Reporting

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Checkmark the box **Can Use Reporting** to give your delegate permission to run and view reports. If you're unable to check this option, it's because no reports are available.

Receives Emails

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Checkmark the box **Receives Emails** to have email notifications about your requests or reconciliations sent to your delegate. If you check this option, both you and your delegate will receive email notifications.

Once you've checkmarked the permissions, click the blue button **Save**.

Request Delegates

Delegates Delegate For

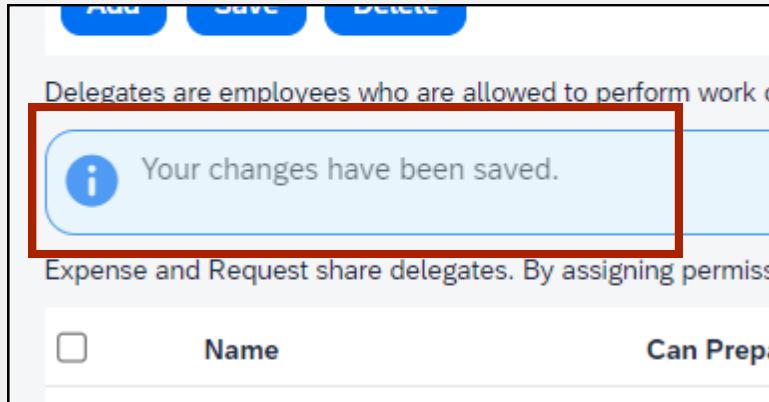
Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can View Receipts	Can Use Reporting	Receives Emails
<input type="checkbox"/>	Calloway, Keesha @utah.gov	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

You'll see a banner that says, "Your changes have been saved."

You've successfully added a delegate!



A screenshot of a web interface for managing delegates. At the top, there are three blue buttons: "Add", "Save", and "Delete". Below them is a light blue banner with a white information icon and the text "Your changes have been saved." This banner is highlighted with a red rectangle. Above the banner, a line of text reads "Delegates are employees who are allowed to perform work on behalf of other employees." Below the banner, another line of text reads "Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request." At the bottom, there is a table with a header row containing a checkbox, "Name", and "Can Prepare".

Remember, you'll still need to submit your requests or reconciliations yourself, because your delegate isn't able to do that on your behalf.

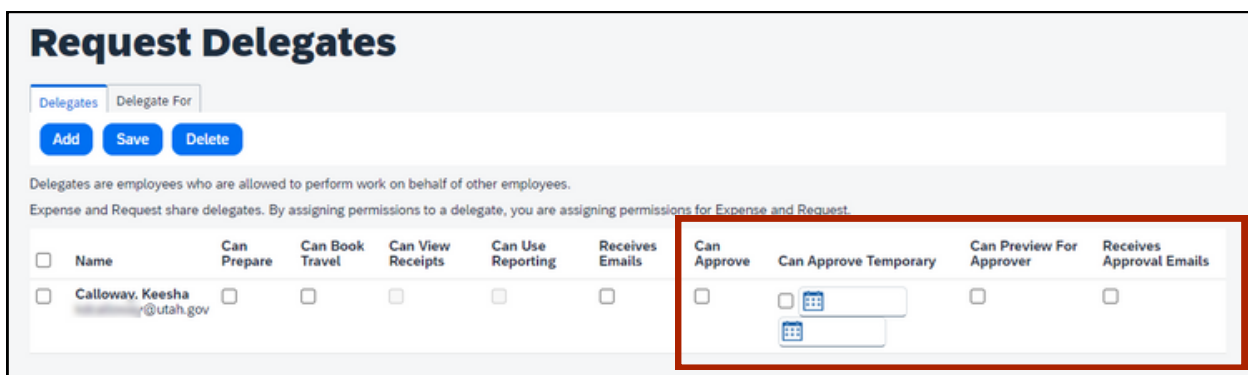


Give permissions for approving requests and reconciliations



If you're an approver, any approver permissions you give your delegate will apply to everything: travel requests, reimbursement requests, and p-card reconciliations. Remember, you can't assign just anyone as your approver delegate; your delegate needs to have similar job responsibilities as you.

Once you've added your delegate, you'll see them in your list. Now you can check the boxes to give them approver permissions.



A screenshot of the "Request Delegates" interface. At the top, there is a title "Request Delegates" and a tab "Delegates". Below the tab are three blue buttons: "Add", "Save", and "Delete". A line of text reads "Delegates are employees who are allowed to perform work on behalf of other employees." Below this, another line of text reads "Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request." At the bottom, there is a table with a header row containing a checkbox, "Name", "Can Prepare", "Can Book Travel", "Can View Receipts", "Can Use Reporting", "Receives Emails", "Can Approve", "Can Approve Temporary", "Can Preview For Approver", and "Receives Approval Emails". The table has one row with the following data: a checkbox, "Calloway, Keesha", a checkbox, a checkbox, a checkbox, a checkbox, a checkbox, a checkbox, a checkbox, a date picker, a checkbox, and a checkbox. The last four columns of the table are highlighted with a red rectangle.

Can Approve

☐

Checkmark the box **Can Approve** to give your delegate permission to approve travel requests, reimbursement requests, and p-card reconciliations.



If you checkmark **Can Approve**, **Can Approve Temporary**, or **Can Preview For Approver**, the box Can View Receipts will be checked automatically. Keep it checked. This box gives your delegate permission to view receipts in the requests or reconciliations they'll be approving.

	Can Prepare	Can Book Travel	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
eesha @utah.gov	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> 01/22/2024	<input type="checkbox"/>	<input type="checkbox"/>

Can Approve Temporary

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Checkmark the box **Can Approve Temporary** to give your delegate permission to approve for a selected time frame. Click the calendar icons to select a start and end date for your delegate to approve on your behalf.

☒

☒ 01/22/2024

<< < Jan 2024 > >>

Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

When the end date has passed, your delegate's approval permissions will be automatically removed.

Can Preview For Approver

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If you want a delegate to preview requests and reconciliations, checkmark the box **Can Preview For Approver**. If you give a delegate this permission instead of Can Approve, they won't be able to approve, but they'll be able to view the request or reconciliation.

This permission is great if you want someone to make sure the submitted requests or reconciliations are complete and accurate before going to you to approve.



If you checkmark **Can Preview For Approver** and **Receives Approval Emails**, then your previewer delegate will also receive emails notifying them that a request or reconciliation is ready for approval. They can then preview it, and click the button **Notify Approver** to send it to you.

Receives Approval Emails

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Checkmark the box **Receives Approval Emails** to have email notifications about the requests or reconciliations sent to your delegate. If you check this option, both of you will receive email notifications.

Once you've checkmarked the permissions, click the blue button **Save**.

Request Delegates

Delegates

Delegate For

Add

Save

Delete

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<input type="checkbox"/>	Calloway, Keesha @utah.gov	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> 01/22/2024	<input type="checkbox"/>	<input checked="" type="checkbox"/>

You'll see a banner that says, "Your changes have been saved."

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Add

Save

Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

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Your changes have been saved.

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare
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