

General Information

A delegate is a user who is granted permission to act on behalf of another user to perform tasks, such as creating and reviewing Travel Requests and Expense Reports. Delegates may be granted permission to perform any of the following:

Option	Description
Can Prepare	If selected, the delegate can create requests/reports on behalf of the traveler.
Can View Receipts	If selected, the delegate can view receipt images on behalf of the traveler.
Receives Emails	If selected, the delegate receives a copy of each request/report related email that the traveler receives, except for approval emails.
Can Approve Temporary	If selected, the delegate can approve requests/reports on behalf of an approver; but only for a specified period. If this option is selected, the approver must also select beginning and ending dates.
Can Preview for Approver	If selected, the delegate can preview requests/reports on behalf of an approver to ensure that the request/report is ready for the approver to review and approve.
Receives Approval Emails	If selected, the delegate receives a copy of each request/report approval related email that the approver receives.

Note: The “Can Approve Temporary”, “Can Preview for Approver” and “Receives Approval Emails” options appear only if:

- The traveler is set up as a request/expense approver.
- The delegate is set up as a request/expense approver.

The Request and Expense modules in Concur share delegates. By assigning permissions to a delegate, a traveler is assigning permissions for Travel Requests and Expense Reports.

Delegates can either be assigned by accessing the “Request Delegates” or “Expense Delegates” page of the traveler’s profile.

Assigning Request/Expense Delegates

To add a delegate, click on “Profile” > “Profile Settings” > “Request Delegates” OR “Expense Delegates” (located on the left-side menu of the screen). On the Request/Expense Delegates page, click “Add”. The search area will appear. Type at least the first three letters of the search criteria (employee’s name, email address, etc.). When the desired name appears, click the name to add the employee as a delegate.

Select the desired delegate options and click “Save”.

Request Delegates

Delegates Delegate For

Add **Save** **Delete**

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

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	Can View Receipts	Receives Emails
<input type="checkbox"/>	CPP, Delegate2 delegate2@cpp.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Profiles that are set up as a request/expense approver, will see the three additional options to select from:

Request Delegates

Delegates Delegate For

Add **Save** **Delete**

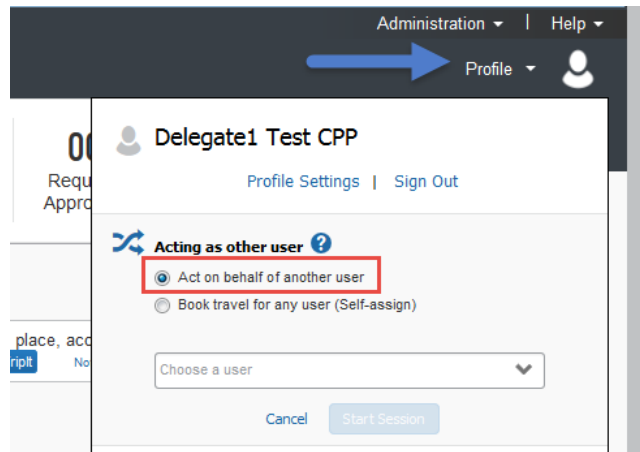
Delegates are employees who are allowed to perform work on behalf of other employees.

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

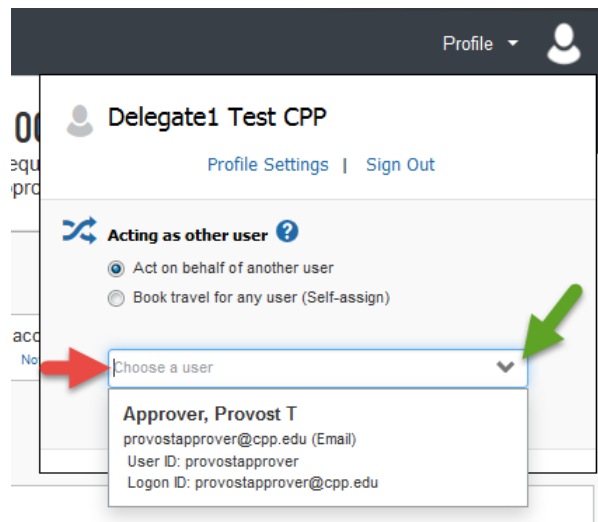
<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	CPP, Delegate1 delegate1@cpp.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Acting as a Delegate

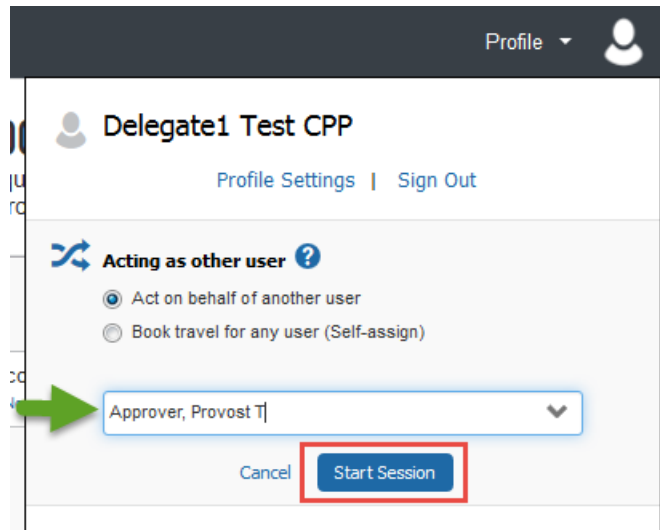
To act as a delegate for another user, click on “Profile”, and then verify that the “Act on behalf of another user” option is selected.



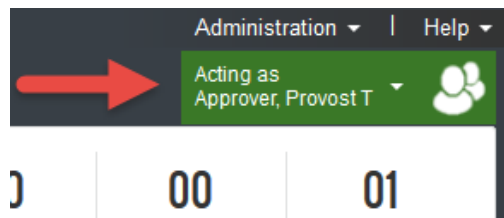
Enter all or part of the user’s name, or use the drop-down arrow to select the user.



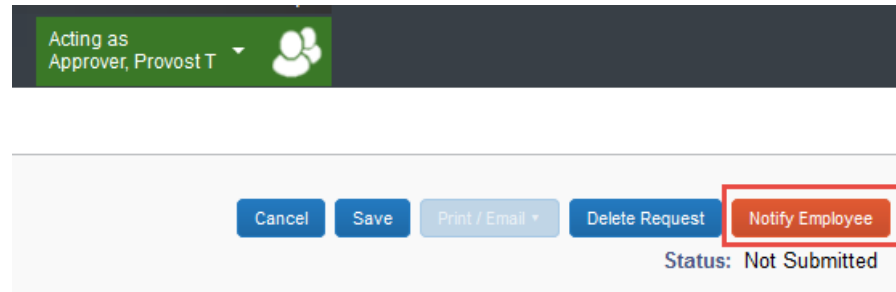
Select the appropriate user from the list, and then click “Start Session”.



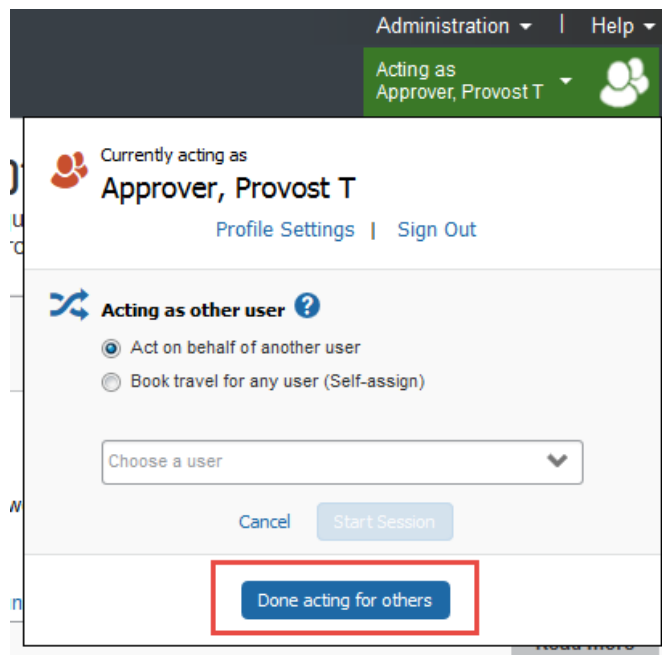
You are now acting as a delegate for this user, and they will have determined your rights and privileges as their delegate.



To notify a traveler that their Travel Request or Expense Report is complete and ready for submission, the Delegate must click on the “Notify Employee” button in the top right corner of the screen. A notification email will be routed to the traveler to let them know they have a Travel Request or Expense Report that is pending their submission.

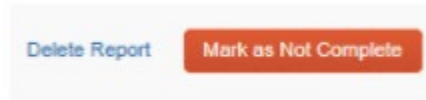


To return to working for yourself, click “Done acting for others”. This will return you to your Concur profile.



Recalling a Request or Report as a Delegate: Mark as Not Complete

After a delegate clicks the “Notify Employee” button, it will change to “Mark as Not Complete”.



As a delegate, you can click “Mark as Not Complete” if you need to go back and make changes to a request or report after you have already notified the employee. The blue checkmark icon will be removed next to the report name and the button will change back to “Notify Employee”.

After you fix the request or report and save your changes, click “Notify Employee” again to let the user know that the report is ready for review and submittal.

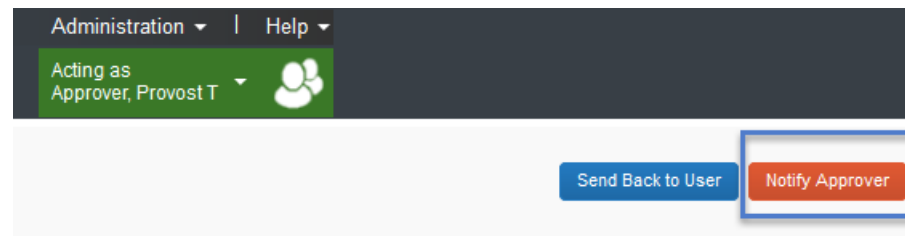
Delegate Preview for the Approver

An approver's delegate can be allowed to *preview* each request/report in the approver's approval queue. This delegate cannot *approve* the request/report – instead, the delegate's task is to ensure that the request/report is ready for the approver to review and approve.


The delegate reviews each request/report, checks for inconsistencies, verifies receipts, and – if necessary – sends back to the traveler for corrections. When ready, the delegate notifies the approver that the request/report is ready for their review.

Note: A delegate who is assigned the “preview” option cannot also be allowed to approve requests/reports on behalf of an approver.

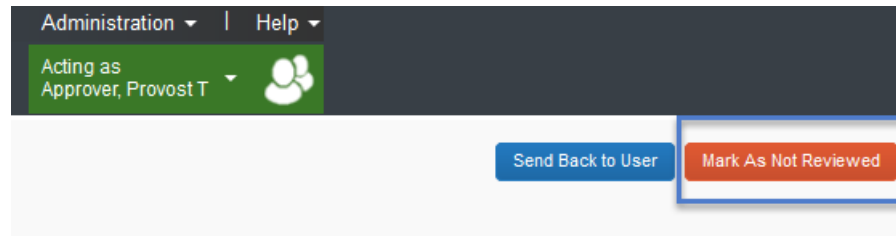
Once the delegate is assigned the proper rights, the delegate accesses the approver's approval queue as usual (as noted above under “Acting as a Delegate”). The delegate opens the desired request/report and reviews the information, verifies receipts, etc. The delegate can follow the same procedural steps for review as outlined in “Approving a Travel Request and Expense Report”. When ready, the delegate clicks “Notify Approver”.



Once the delegate clicks “Notify Approver”:

- An email is sent to the approver, indicating that the request/report has been reviewed by the delegate.
- An icon () appears in the approval queue so the approver knows the request/report has been reviewed. This icon is visible to all users who may view the queue, both delegates and the approver.

Note: If the delegate reviewed the request/report in error, the delegate clicks “Mark As Not Reviewed”.



The “reviewed” icon is removed from the approval queue so the approver knows the request/report is not ready; however, it does not recall the email notification to the approver nor does it send an updated email to the approver.

The delegate’s action is reflected in the audit trail of the request/report, which is visible to the traveler, delegate, and approver.

09/19/2018 12:07 PM	CPP, Delegate1	Reviewed by Delegate	Report has been reviewed by delegate
---------------------	----------------	----------------------	--------------------------------------

[Campus Contact Information](#)

If you have questions regarding the Travel Procedures or how to use Concur, please contact:

Travel@cpp.edu

A staff member from University Accounting Services/Accounts Payable will contact you to address your question.

If you have technical questions regarding the Concur system, cannot log into the system, or your default approvers need to be updated, please contact:

concurtech@cpp.edu

A staff member from IT will contact you to address your question.