Delegate Tips & Tricks

A Delegate may:

- Prepare Requests and Expense Reports (perform data entry) for others
- Receive document status change notifications
- Receive approval notifications and approve on behalf of another approver, OR
- Receive approval notifications and Preview (checkmark reviewed) before the approver

To Act as a Delegate: Login to Concur

1. In the drop-down upper-right of your dashboard, click Profile
2. Select Act of behalf of another user
3. Begin typing the name below to search and select from the list
   - Note: The employee must assign you as a delegate in their Profile Settings (see below). Travel Services can also enable delegate permissions.
4. Click Start Session. You are now acting as a delegate for this user, displayed by the green label “Acting as . . .”
5. To Return to working for yourself, click “Acting as . . .” and Click Done Acting for others

Review/Assign Delegates for yourself by clicking on “Request Delegates” and Add

1. Check boxes for appropriate permissions: Can Prepare and Receives Emails
2. Delegate updates are the same in both Request and Expense
3. Approvers may delegate approval permissions for a temporary or permanent time period; check Can Approve and Receives Approval Emails box. Previewer- may view and mark as Previewed for the Approver
4. Remember to click Save after any addition or change

Delegate - Create an Event Request for Multiple Employees:

1. From the Concur dashboard, click Requests
2. Click Create New and select New Event Request (if you don’t see this option, please contact Travel Services to enable this permission)
3. Complete the Request Header information
4. At the bottom of the Header add up to 10 Attendee Names
5. Complete entering Air Segment and Estimated Expenses
6. From the Request Header, click Generate & Notify
7. Attendees may edit individual Requests as needed (a delegate may also edit if required)