HELPFUL HINTS

- Approvers can assign a delegate to approve travel requests on their behalf.

Tip: the delegate approver must log into Concur and act on behalf of the approver. From the Profile link at the top right, click on Act on behalf of another user. Select the approver and click on Start Session.

PROCEDURE

1. To assign an approver delegate, click on profile, then profile settings.

2. Within profile settings, select either request delegates or expense delegates. Although titled differently, both function the same to add a delegate.

3. Click on Add.
ASSIGN AN APPROVAL DELEGATE

4. Enter all or part of the individual’s name. Once the name has been located, click on Add.

5. Select the user from the list, then checkmark the applicable checkbox(s) for roles. Delegate permission can be assigned for a designated amount of time by selecting Can Approve Temporary and entering a date range. Ensure the Can View Receipts box is checked so approver delegate can view receipts.

6. Click on Save.

7. To delete a delegate, select the checkbox next to their name and click on Delete.

If you want to keep the delegate name listed but want to remove or edit the options, simply uncheck the unwanted approval options and click on Save.