

ASSIGN AN APPROVAL DELEGATE

TRAVEL APPLICATION

Approvals

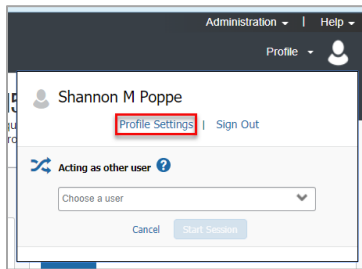
HELPFUL HINTS

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

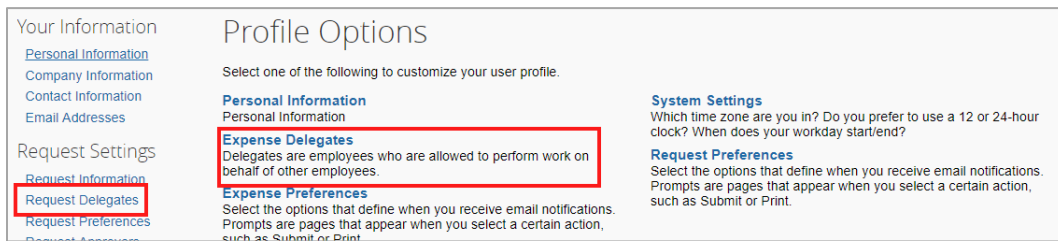
i Tip: the delegate approver must log into Concur and act on behalf of the approver. From the Profile link at the top right, click on *Act on behalf of another user*. Select the approver and click on **Start Session**.

PROCEDURE

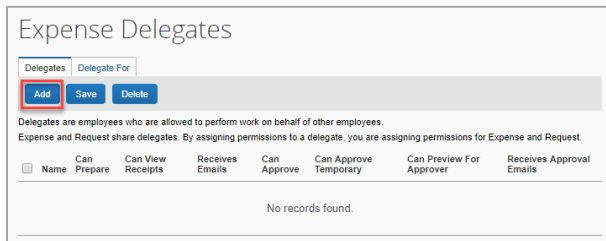
1. To assign an approver delegate, click on profile, then profile settings.



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**.



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

Expense 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

Rutt, Aaron Add

Rutt, Aaron
arutt@nebraska.edu

- 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.

Expense 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	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Rutt, Aaron arutt@nebraska.edu	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 10/01/2018 10/05/2018	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- 6. Click on **Save**.
- 7. To delete a delegate, select the checkbox next to their name and click on **Delete**.

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<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input checked="" type="checkbox"/>	Rutt, Aaron arutt@nebraska.edu	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 10/01/2018 10/05/2018	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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Updated September 26, 2019

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**.