

## Step-by-Step Guide

### Identifying Delegates in the Concur Travel & Expense System

#### What is a Delegate?

A delegate is an individual authorized to process expense reports, in the Concur Travel & Expense System, on behalf of another person.

Delegates are not policy specific – that is, as a delegate you can process both Procurement Card expense reports and Travel Reconciliation expense reports on behalf of the individual for whom you are a delegate. It is up to you and the individual to identify which type(s) of expense reports you should actually process.

There are two types of delegates:

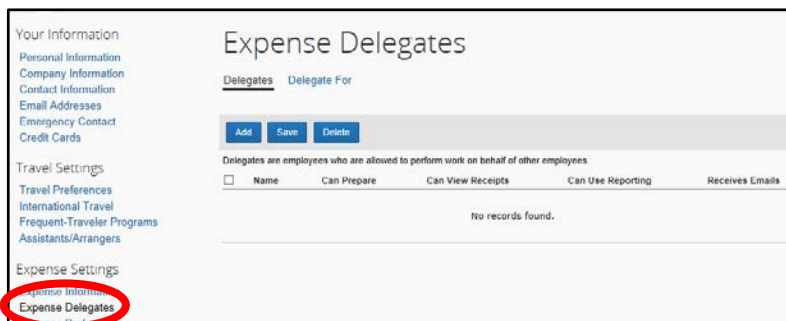
- A Prepare Delegate can prepare expense reports for another individual.
- An Approve Delegate can approve expense reports on behalf of another individual. (To be an Approve Delegate, you must already have approval authority.)

Delegates are assigned for expense report processing, while travel arrangers are assigned for travel processing. Delegates and travel arrangers are not necessarily the same people. An individual can be just a delegate, just a travel arranger, or both a delegate and a travel arranger.

#### Accessing Your Expense Delegates Page

Delegates are identified on the Expense Delegates page, which is located under your Concur Profile.

1. Begin by accessing Concur via [your campus portal](#). Within your portal's top navigation bar, use the **Business Tools** dropdown menu to select **Concur Travel & Expense System**.
2. Select your **Profile** menu in the upper right corner of your screen and click **Profile Settings**.
3. Click **Expense Delegates** (left-side menu).



If you already have delegates identified, they will appear here.

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### Adding Delegates

**Note:** If you have 25 or more delegates to add, you can instead submit the [Delegate Authorization \(DA\) form](#). You can also use the DA form to identify delegates by HR org number.

To add someone to act on your behalf, whether it is as a Prepare Delegate or Approve Delegate, click **Add**. Search for the employee you wish to add as your delegate. You can search by name, employee ID, or email address. Then, select your delegate from the resulting list.

#### *If identifying a Prepare Delegate...*

Expense Delegates

Delegates Delegate For

**Add Save Delete**

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

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails
<input type="checkbox"/>	Vallad, Lisa lisa.vallad@cu.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Check the **Can Prepare** box. The **Can View Receipts** box will automatically appear checked as this gives your delegate the ability to view receipt images.

If you would like your delegate to receive emails from the Concur Travel & Expense System regarding your Concur tasks (such as status changes, reminder emails, etc.), also check the **Receives Emails** box.

Click **Save**; a message will appear confirming your delegate has been saved.

#### *If identifying an Approve Delegate...*

An Approve Delegate can be assigned on a temporary or permanent basis.

Expense Delegates

Delegates Delegate For

**Add Save Delete**

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

You may assign a temporary approver for a maximum of 120 days.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Dyet, Brian dyet@cu.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Ellis, Mary mary.ellis@cu.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Hoyer, Heather heather.hoyer@cu.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Roden, Normandy normandy.roden@cu.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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To set a permanent Approve Delegate, check the **Can Approve** box. Or, to set a temporary Approve Delegate, check the **Can Approve Temporary** box and use the calendar to set the temporary approval timeframe. The **Can View Receipts** box will automatically appear checked as this gives your delegate the ability to view receipt images.

If you would like your delegate to receive emails from the Concur Travel & Expense System regarding your Concur tasks (such as status changes, reminder emails, etc.), also check the **Receives Approval Emails** box.

Click **Save**; a message will appear confirming your delegate has been saved.

If the individual doesn't already have approval authority as part of his or her position, the approval checkboxes will be unavailable for selection (grayed out).

## Deleting Delegates

**Note:** If you have 25 or more delegates to remove – or any number of inactive delegates – you can instead submit the [Delegate Authorization \(DA\) form](#). You can also use the DA form to delete delegates by HR org number.

To remove someone from your delegate list because you no longer want him or her to act on your behalf:

Select the appropriate individual using the checkbox to the left of the individual's name and click **Delete**.

The screenshot shows the 'Expense Delegates' interface. At the top, there are tabs for 'Delegates' and 'Delegate For'. Below the tabs are three buttons: 'Add', 'Save', and 'Delete'. The 'Delete' button is circled in red. Below the buttons is a text box stating 'Delegates are employees who are allowed to perform work on behalf of other employees.' Below this is a table with columns for 'Name', 'Can Prepare', and 'Can View Receipts'. The first row in the table is for 'Vallad, Lisa' with email 'lisa.vallad@cu.edu'. The 'Can Prepare' and 'Can View Receipts' columns have checked boxes. The checkbox in the first column is also circled in red.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts
<input checked="" type="checkbox"/>	Vallad, Lisa lisa.vallad@cu.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

You will receive a pop-up message for verification. To remove the delegate from your list, click **OK**. A message will appear confirming your delegate has been removed from your list.