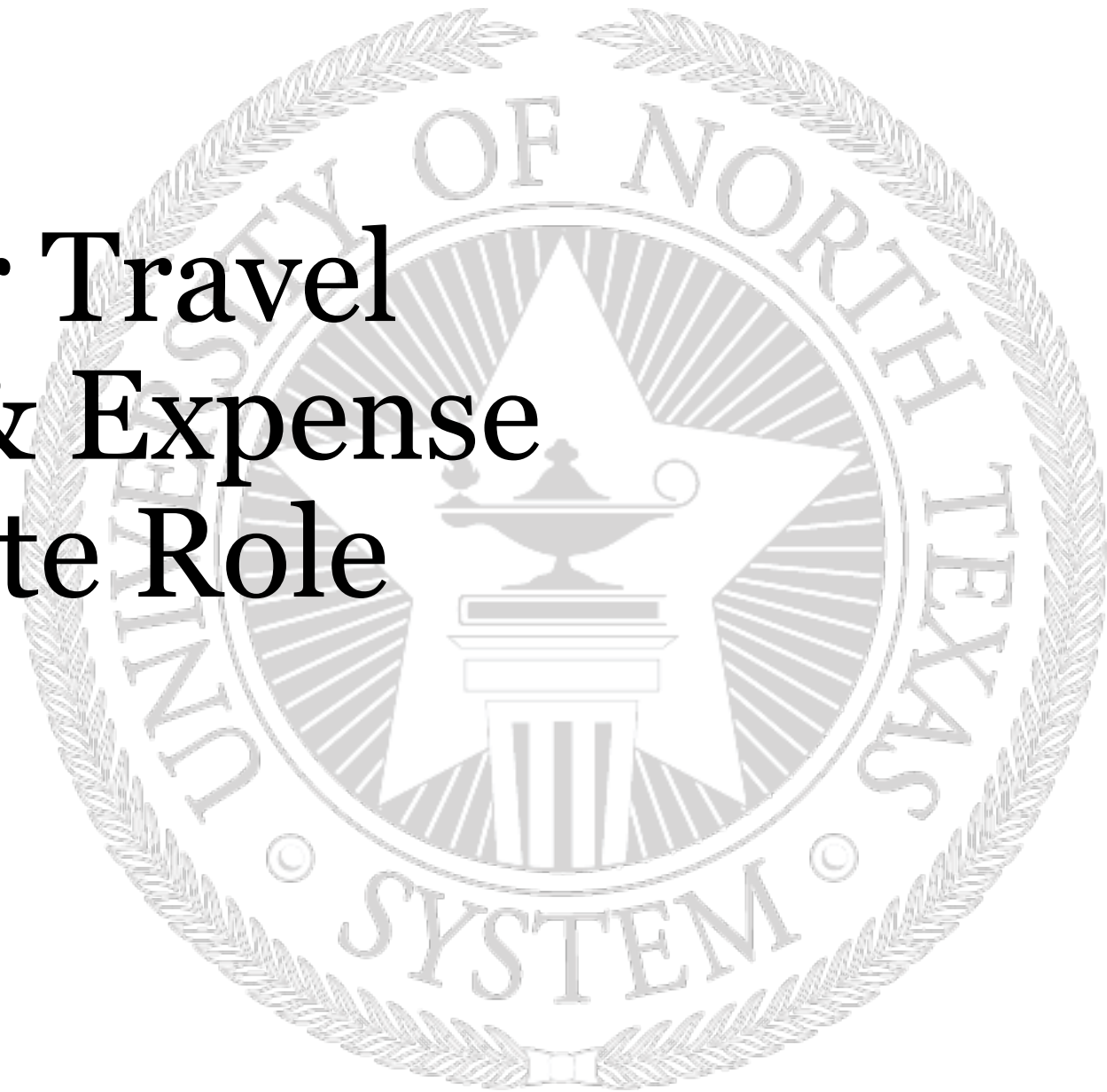


Concur Travel Request & Expense Delegate Role



Delegate Role

- Delegates are assigned by an Employee through Concur Profile Settings/Profile Options
- Delegate Responsibilities can include
 - Build Requests and Expense Reports on behalf of an Employee
 - Preview Requests (TBAs) and Expense reports submitted for approval prior to final approval
 - Approve Requests & Expense Reports on behalf of an Approver in case of absence (only authorized Approvers can be an Approver Delegate)



Your Information

[Personal Information](#)[Company Information](#)[Contact Information](#)[Email Addresses](#)[Emergency Contact](#)[Credit Cards](#)

Travel Settings

[Travel Preferences](#)[International Travel](#)[Frequent-Traveler Programs](#)[Assistants/Arrangers](#)

Request Settings

[Request Information](#)[Request Delegates](#)[Request Preferences](#)[Request Approvers](#)[Favorite Attendees](#)

Expense Settings

[Expense Information](#)[Expense Delegates](#)[Expense Preferences](#)[Expense Approvers](#)[Favorite Attendees](#)

Profile Options

Select one of the following to customize your user profile.

Personal Information

Your home address and emergency contact information.

Company Information

Your company name and business address or your remote location address.

Credit Card Information

You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

E-Receipt Activation

Enable e-receipts to automatically receive electronic receipts from participating vendors.

Travel Vacation Reassignment

Going to be out of the office? Configure your backup travel manager.

Request Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Change Password

Change your password.

System Settings

Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information

How can we contact you about your travel arrangements?

Setup Travel Assistants

You can allow other people within your companies to book trips and enter expenses for you.

Travel Profile Options

Carrier, Hotel, Rental Car and other travel-related preferences.

Expense Delegates 

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

Expense Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Concur Mobile Registration

Set up access to Concur on your mobile device

To add a Delegate;
Log into Concur,
Select Profile ->
Profile Settings ->
Profile Options ->
Expense Delegates

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Expense Delegates

Select Add

Delegates Delegate For

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"/>	previewer, previewer previewer@untsystem.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>



Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

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

delegate, delegate

Add

Cancel

	Employee Name	Employee Email	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	delegate, delegate	ConcurTest@untsystem.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	previewer, previewer	previewer@untsystem.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Begin typing the last name of the Employee that will be granted the Delegate Role

Select Add

Expense Delegate Role – Permission Options

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'. A yellow arrow points to the 'Save' button. Below the buttons, there is a text box explaining that delegates are employees allowed to perform work on behalf of other employees, and that expense and request share delegates. Below this is a table with columns for Name, Can Prepare, Can View Receipts, Receives Emails, Can Approve, Can Approve Temporary, Can Preview For Approver, and Receives Approval Emails. The table contains one row for a delegate named 'delegate, delegate' with email 'ConcurTest@untsystem.edu'. The 'Can Prepare' and 'Can View Receipts' checkboxes are checked. The 'Can Approve Temporary' column has a date picker.

<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"/>	delegate, delegate ConcurTest@untsystem.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> [Date Picker]	<input type="checkbox"/>	<input type="checkbox"/>

To select the type of permissions to be granted to a Delegate; Select the appropriate check boxes. Then Select Save

“Can Prepare” – Allows the Delegate to prepare Requests and Expense Reports on the Employee’s behalf.

“Can View Receipts” – Concur will automatically check this box if “Can Prepare” is selected.

Expense Delegate Role – Permission Options Continued

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"/>	delegate, delegate ConcurTest@untsystem.edu	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

“Can Preview For Approver” – Allows the Delegate to perform an initial review and then notify the Approver when completed or send report back to the Employee for more information. This role cannot approve Requests or Reports.

“Can View Receipts” – Concur will automatically check this box if “Can Preview” is selected.

Expense Delegate Role – Permission Options Continued

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"/>	delegate, delegate ConcurTest@untsystem.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

“Receives Emails” – Allows the Delegate to receive email notifications and status updates for Requests and Expense Reports.

“Receives Approval Emails” – Allows the Delegate to receive notification of pending Approval emails.

Expense Delegate Role – Permission Options Continued

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"/>	delegate, delegate ConcurTest@untsystem.edu	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>

“Can Approve” – Allows the Delegate to receive email notifications of Approved Requests and Expense Reports.
NOTE: Only authorized Approvers can be given this role.

“Can View Receipts” – Concur will automatically check this box if “Can Approve” is selected.

Expense Delegate Role – Permission Options Continued

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"/>	delegate, delegate ConcurTest@untsystem.edu	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> 11/16/2018	<input type="checkbox"/>	<input type="checkbox"/>

12/03/2018

<< < Dec 2018 > >>

Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

“Can Approve Temporary” – Allows the Delegate to receive email notifications of Approved Requests and Expense Reports for a specified time period.
NOTE: Only authorized Approvers can be given this role.

“Can View Receipts” - Concur will automatically check this box if “Can Approve” is selected.

Expense Delegate Role – Permission Options Continued

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 checked="" type="checkbox"/>	delegate, delegate ConcurTest@untsystem.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

To remove or replace a Delegate;

Select the checkbox next to the name of the Delegate.

Then Select the Delete option.

Travel Assistants

- Concur Travel Assistant Role is not a Delegate Role option.
- Travel Assistants are given authority to access an Employee's Concur profile to book Travel through Concur on their behalf.
- For additional information on how to set up a Travel Assistant, please go to untsystem.edu/concurtravel

Thank You

UNT System Travel Team

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1-866-793-4040

CTP Free Online Help for
Concur Travel Booking Tool

877-727-5188