CONCUR | ADDING A DELEGATE (REQUEST AND EXPENSE)

OVERVIEW
A Delegate is an individual designated in Concur to assist with creating requests, booking travel, and creating expense reports or approving requests on behalf of another Concur user. Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Concur Profile, Concur Request, and Concur Expense access.

There are three (3) types of delegates:

1. A **Preparer** Delegate - can prepare/submit requests and prepare expense reports on behalf of a user.

   **NOTE:**
   1. Preparer delegates cannot submit requests containing cash advances.
   2. Preparer delegates will notify the traveler when an expense report is ready for review and submission, however they will NOT be able to submit the expense report on behalf of a traveler.

2. An **Approver** Delegate - can approve requests or expense reports on behalf of a user. (To be an Approver Delegate, you must already have the approver role.)

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

3. A **Previewer** Delegate - can review submitted requests and expense reports on behalf of an Approver, however they will not be able to approve these requests or expense reports.

Refer to the Delegate reference material for additional details.

HOW TO ADD A DELEGATE
Below is a list of the steps you will take in your Concur profile to add a prepare or approve delegate.

1. Navigate to any web browser.
2. Access Concur by clicking on the following: Concur SSO.
3. Select your Profile menu in the upper right corner of the page.
4. Under your name select Profile Settings.
5. On the left of your screen select Request Delegates.
6. Click Add below the word Delegates, then type in your search information.

   TIP: You can search by employee name, email address, employee id or login id.

7. Once the name you are searching for appears, verify all the information is correct.
8. Click on the name or click add to the right of the correct search result.
9. Click the check boxes to assign the permission you would like to give the delegate.

   a. **Can Prepare** - This user may prepare request and expense reports on your behalf. Preparers can submit requests on a user’s behalf if the request does not contain a Cash Advance. Expense reports cannot be submitted by a delegate, unless the traveler is no longer a UConn employee.

   b. **Can View Receipts** - Should check by default when selecting Can Prepare. This allows this user to view your receipt store, e-receipts, receipts images, etc.

   c. **Receives Emails** - This user will be copied by all emails generated by Concur addressed to you.

   d. **Can preview for approver** – this user can review all requests and expense reports submitted to the approver that has delegated to them.

   **NOTE**: If the individual doesn’t already have approval authority as part of his or her position, the following approval checkboxes will be unavailable for selection (grayed out or not shown).

   e. **Can Approve** - This user can approve requests on your behalf permanently.

   f. **Can Approve Temporarily** – This user can approve requests or expenses in a temporary approval timeframe (usually assigned when the approver will be out of office with no access to approve in Concur themselves).

   **NOTE**: The approver is responsible to designate a backup/temporary approver to act on his/her behalf for a specified time if they will not be available.

   g. **Receive approval emails** - This user will be copied by all approval emails generated by Concur addressed to you.

10. Click **Save**. Once you click save, the next time your delegates logs into Concur, they will be able to act as your delegate and use the functions you have given them permission to perform.

   **NOTE**: 'Acting as' will be shown at the top right corner of the screen when you are logged in working as a delegate of a traveler.

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**ADDITIONAL SUPPORT**

For help with Concur, contact travel@uconn.edu. For additional reference material, refer to [https://travel.uconn.edu/](https://travel.uconn.edu/).