

Overview

In Concur, a delegate is someone who is authorized to perform various tasks within the system on behalf of another Concur user. There are two types of delegates:

- A Report Delegate can create expense reports for another user, but cannot submit the report – expense reports must be submitted by the person that incurred the expense.
- An Approval Delegate is a user with Approver access that can review and approve expense reports for another Approver.

Some important points about Approval delegates:

- Approval delegates can be set up to approve reports on another's behalf at all times, or only for a specified time, for example, to provide coverage for another Approver's vacation.
- Delegates can be assigned Preview access, which enables a delegate to review an expense report for the assigned Approver, and confirm it is ready for approval. Delegates with Preview access cannot approve reports on behalf of the other Approver.

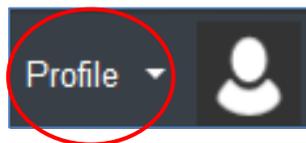
This Guide provides instructions on how to assign a delegate to approve expense reports for you.

Assigning Approval Delegates

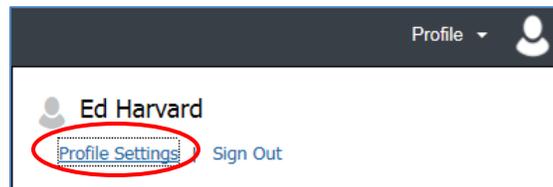
After logging in to Concur with your HarvardKey, the Concur Home Page appears. Assigning, removing, and maintaining your delegates are controlled within your Concur Profile.

To assign a delegate:

1. Click the **Profile** button at the top right of the window.



2. Click **Profile Settings**.



3. On the left side of the Profile Options page, under **Expense Settings**, click **Expense Delegates**.



4. On the **Expense Delegates** page:
 - a. Click **Add**. A search bar appears.
 - b. Enter the name or ID number of the person you want to assign as your delegate.
 - As you enter the first few characters of your search, the system will provide options that match what you've entered so far.
 - c. Select the desired delegate when it appears in the list.
 - d. Click the **Add** button to the right of the search field.

Expense Delegates

Delegates Delegate For

a

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 logon id **d**

b Approver1, Harvard **d** Add Cancel

Approver1, Harvard
 albert_fernandez@Harvard.edu
 User ID: approver1 **c**
 Logon ID: approver1@Harvard.edu

Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
Approver1, Harvard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The selected name is added to the Delegates list.

5. Next to the delegate's name, select the checkboxes for the tasks you want your approval delegate to be able to perform on your behalf:
 - In order for a delegate to approve expense reports at all times, you must select the **Can Approve** checkbox.
 - If you want the delegate to approve reports for a specified amount of time, select the **Can Approve Temporary** checkbox and then select the start and end dates using the **Calendar** buttons.
 - If you want the delegate to be allowed to preview each expense report in the approver's approval queue, but not approve the reports, select the **Can Preview for Approver** checkbox.
 - If you want your delegate to be copied on approval-related emails you receive from the Concur system, select the **Receives Approval Emails** checkbox.

Expense Delegates

Delegates Delegate For

Add Save Delete

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

Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
McGonagle, Ed edward_mcgonagle@harvard.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

6. Click **Save**.

Resources

Quick Reference Guides and Online Tutorials

Quick Reference Guides provide step-by-step instructions on a number of common tasks in Concur, and online tutorials present a video walk-through of how to perform various tasks and procedures within the system. Both the Guides and online tutorials are available at: travel.harvard.edu/concur-training

Concur Support

24 hour support is available through the Concur Support Desk at 866-793-4040. You can also access the Concur Support Portal within the system by clicking the **Help** menu, and then selecting **Contact Support**.