Concur Tip Sheet:

Assigning Approval Delegates

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 and PCard statement reports for another user but cannot submit the report. Expense and PCard statement 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 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 and/or PCard statement reports for you.
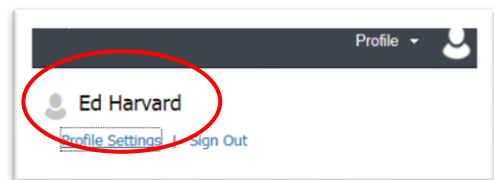
Assigning Approval Delegates

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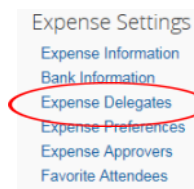
1. Click the **Profile** button at the top right of the window.
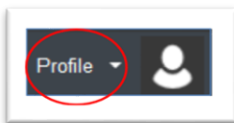
2. Click **Profile Settings**.

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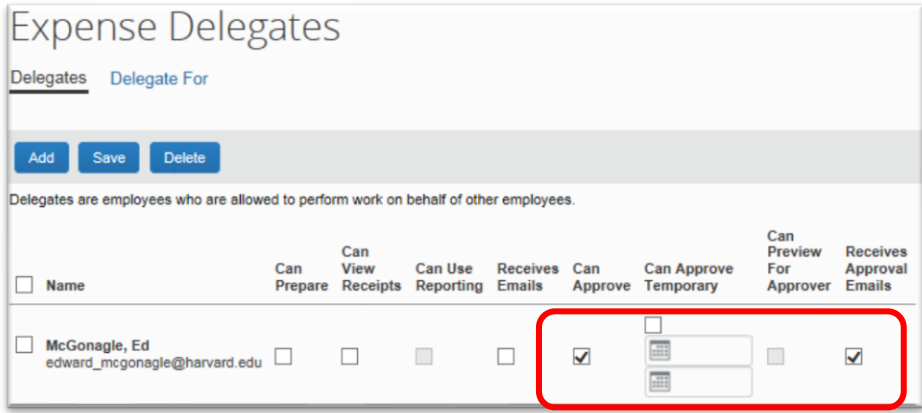
4. On the Expense Delegates page:

a. Click Add. A search bar appears.
b. Enter the name or ID number of the person you want to assign as your delegate.
o 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.

The selected name is added to the Delegates list.
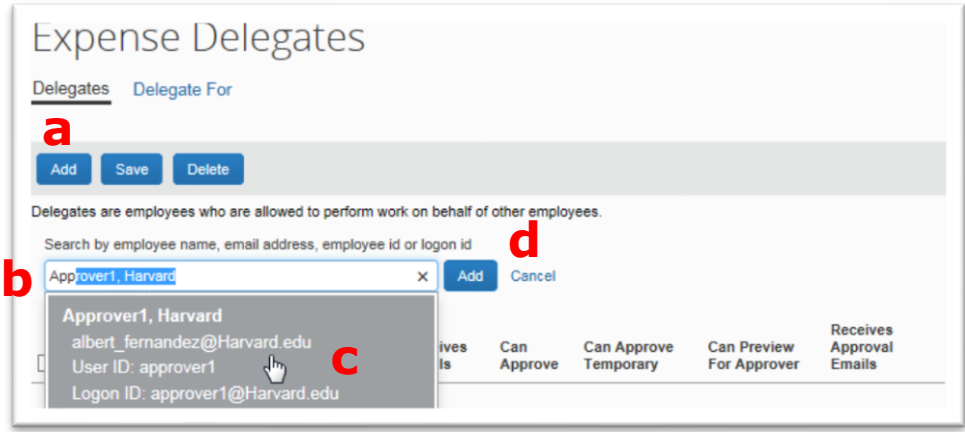
5. Next to the delegate's name, select the checkboxes for the tasks you want your approval delegate to be able to perform on your behalf:
• In order for a delegate to approve reports at all times, you must select the **Can Approve** checkbox.
• If you want the delegate to approve reports for a specified 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 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.

6. Click **Save**.