

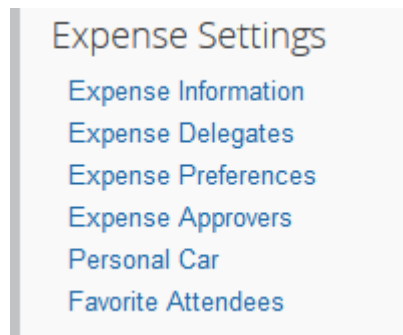
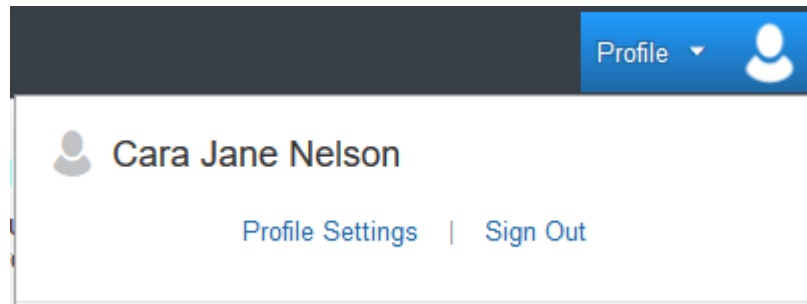
Concur – Setting Up / Updating / Deleting Delegates

Process: To manage the list of people for whom you have delegated authority to create, review, or approve Concur reports on your behalf.

PROCEDURES

To add/review delegates for your Concur user profile and assign/update permissions to the delegates that enable them to perform specific tasks on your behalf, click on the arrow next to Profile and then click on Profile Settings

Scroll down to the Expense Settings section in the left column.



Click on Expense Delegates to open your current delegates and the current permissions you have assigned to those delegates.

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A listing of existing delegates and their previously assigned permissions will appear.

ADDING A NEW DELEGATE:

To add a new delegate, click ADD.

You can search for a delegate by name, UK email address (xxxxxx@uky.edu), employee ID, or SAP user ID.

Start typing the delegate's information in the field until you see the desired delegate. (For this example, the email address was used for the search.)

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.
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	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Duty, Leslie ldu227@uky.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Add Cancel

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

NOTE: Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for both Expense and Request.

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

Add Cancel

- gtconl2@uky.edu - Virginia Conley
- gtconl2@uky.edu
- User ID: 00046970
- Logon ID: gtconl2@uky.edu

vs.

By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Click on the delegate’s information and the individual will be added to your list of delegates without any permissions.

Review the delegate permission definitions before selecting the permissions.

Click the check boxes to assign the necessary permission for this delegate. Click SAVE.

Delegates

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<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"/>	Conley, Virginia gtconl2@uky.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Duty, Leslie ldu227@uky.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Delegate Permissions:

Permission:	Definition:
Can Prepare	If selected, the delegate can create requests and expense reports on your behalf.
Can View Receipts	If selected, the delegate can view receipt images on your behalf.
Receives Emails	If selected, the delegate receives a copy of each email you receive, except for approval emails.
Can Approve	If selected, the delegate can approve requests and expense reports on your behalf.
Can Approve Temporary	If selected, the delegate can approve requests and expense reports on your behalf but only for the time period selected. The beginning and end date must be selected and the time frame for the temporary approval can be no more than 120 days.
Can Preview for Approver	If selected, the delegate can preview requests and expense reports on your behalf but cannot <u>actually approve</u> the reports. (NOTE: this permission cannot be selected if the delegate already has either of the Can Approve options selected.)
Receives Approval Emails	If selected, the delegate receives a copy of each approval related email that you receive.

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<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"/>	Conley, Virginia gtconl2@uky.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input 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 CHANGE AN EXISTING DELEGATE:

To change an existing delegate, go to Profile – Profile Settings – Expense Delegates.

Review the list of delegates, make the required permissions changes, and click SAVE.

The screenshot shows the 'Delegates' management interface. At the top, there are tabs for 'Delegates' and 'Delegate For', and buttons for 'Add', 'Save', and 'Delete'. Below this, there is explanatory text: '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. 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	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Conley, Virginia gtcon12@uky.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> [Calendar icon]	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Duty, Leslie ldu227@uky.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> 08/01/2020 <input type="checkbox"/> 08/30/2020	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Concur – Setting Up / Updating / Deleting Delegates

TO DELETE AN EXISTING DELEGATE:

To delete a delegate, go to Profile – Profile Settings – Expense Delegates.

Click the check box before the delegate and click DELETE.

A pop-up box will appear asking you to confirm that you want to delete the selected delegate. Click OK.

The deleted delegate will be immediately removed from your delegate list.

Delegates

Delegate For

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<input checked="" type="checkbox"/>	Conley, Virginia gtcon2@uky.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Duty, Leslie ldu227@uky.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Are you sure you want to delete the selected delegates?

OK Cancel

Expense Delegates

Delegates

Delegate For

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<input type="checkbox"/>	Duty, Leslie ldu227@uky.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>