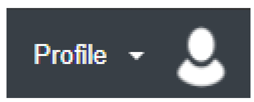
Instructions for Creating a Delegate

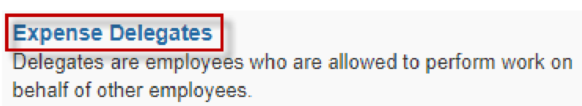
Procedure: Use these instructions to add a delegate, change a delegate's permissions, or delete a designated delegate that you have assigned or that has been assigned by your department.

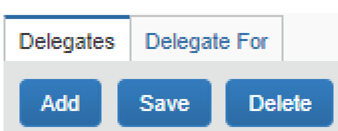
> **Note:** A delegate can process requests or manage expenses. A delegate <u>cannot</u> submit an expense report into workflow on the traveler's behalf. The traveler <u>must</u> submit their own expense report in order to certify it.

> **Note:** Having a delegate does not remove the traveler's ability to enter travel requests, book segments, or manage expenses.

- From the Concur dashboard, click 

Profile.
- Click 

Profile Settings to display your traveler profile.
- Click 

Expense Delegates from the Profile Options.
- You can add, make changes, or delete a delegate using the 

Add, Save, and **Delete** buttons on the **Delegates** tab.

  Note: Delegate permissions include both the Request and Expense modules and cannot be given separately.

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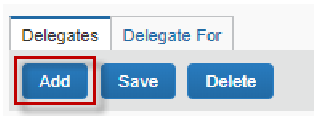
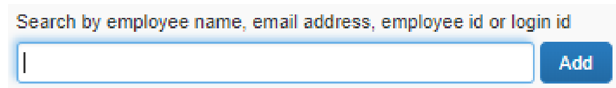
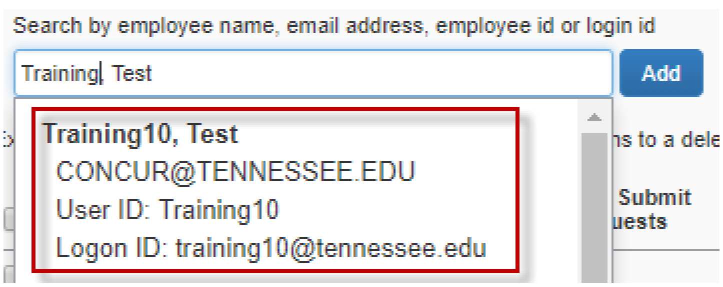
To add a new delegate:

- Click 

Add to display 

Search. Enter the employee's name, email, or NetID to locate the traveler you would like to add as a delegate.

  Note: You should enter employee information as search criteria and select the appropriate employee from the dropdown menu. If you do not select results from the dropdown the field contents will be cleared.

- Once the user has been selected, click **Add.**
- When the new delegate has been added, you can begin adding permissions.

  Note: Permissions allow a delegate to process certain aspects of an employee's travel, such as preparing travel, receiving notifications about your trips via email, or approving on your behalf.

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See the table below for permission selections and definition.

Permission	Definition
Can Prepare	Can create Request or Report and add expenses.
Can Submit Reports	**Not Applicable**
Can Submit Requests	Can create Request, add expense approximations, and submit into workflow
Can View Receipts	Can view assigned and unassigned receipts
Can Use Reporting	**Not Applicable**
Receives Emails	Receives email notifications when a Request or Report has a workflow related action taken on it. (submitted, recalled, sent back, etc.)
Can Approve	Can approve on your behalf
Can Approve Temporary	Can approve on your behalf within the date range you enter
Can Preview For Approver	Can act as a previewer for an approver. This function allows other departmental users to review travel entries prior to workflow approval.
Receives Approval Emails	Is notified via email when a Request or Report has been approved.

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- Once your selections have been made, click 

Save. You will receive a notification that your changes were saved.

Note: A delegate who has approval permissions for a specific traveler cannot also have review permissions for that traveler.

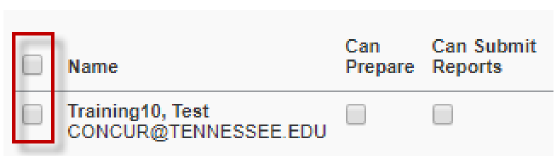
To make changes to a current delegate:

- Check or uncheck boxes to add or remove permissions.
- Once your changes have been made, click 

Save.

To delete a current delegate:

- Click the **Check Box** next to the delegate's name you wish to delete. You can click the **Check Box** next to "Name" to select all delegates.



	Name	Can Prepare	Can Submit Reports
☐	Training10, Test CONCUR@TENNESSEE.EDU	☐	☐

- Click **Delete** to remove the delegate(s). You will see a popup message notifying you that the changes were saved.
- Your changes should take effect immediately.

If you have questions, email concur@tennessee.edu