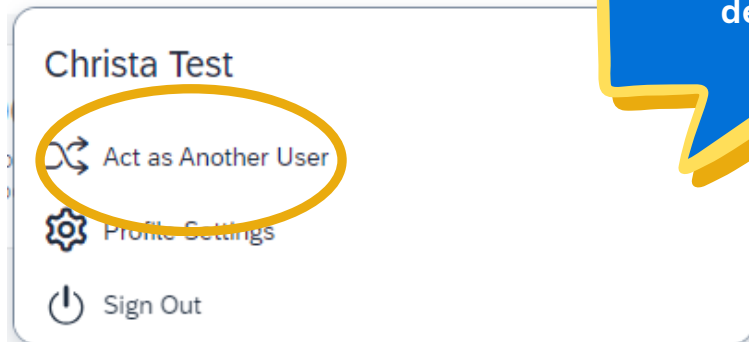


# Getting Started with Concur: **Delegates**

**Terminology:**  
delegate



Concur uses the term delegate to refer to a person who has permission to act as another user within the Concur system.

## Manage Requests

### Request Library

View [Active Requests](#) ▾ [Create New Request](#)

<b>Training with CA</b> 10/27/2023   3376 <b>\$525.00</b> <span>Returned</span> Sent Back to Employee	<b>Cash Advance Test</b> 10/26/2023   3374 <b>\$375.00</b> <span>Submitted</span> Pending Travel Supervisor Approval Test, Nick	<b>Flying, Driving, Staying</b> 10/25/2023   336R <b>\$2,050.00</b> <span>Approved</span>	<b>Workshop in Emporia</b> 10/23/2023   336P <b>\$250.00</b> <span>Approved</span>	<b>International Conference</b> 10/22/2023   336T <b>\$250.00</b> <span>Not Submitted</span>
<b>Training in Topeka</b> 10/12/2023   336M <b>\$79.26</b> <span>Submitted</span> Pending Business Liaison Approval Test Approver, International	<b>September Conference</b> 09/25/2023   336K <b>\$391.48</b> <span>Submitted</span> Pending Travel Supervisor Approval Test, Nick			

This can be a person who has permission to create requests or reports on behalf of a user



+  
Start a  
Request

+  
Start a  
Report

02  
Required  
Approvals

00  
Authorization  
Requests

00  
Available  
Expenses

00  
Open  
Reports

## Company Notes

Deployment Toolkit

[Click here to view the deployment toolkit using this link.](#)

Concur Training

This link will provide information on how to utilize the Concur Expense System.

## My Tasks

**02** Required Approvals →

Nick T. | Europe Travel Request

\$3,000.00 — Travel

Stacy T. | Red Stapler

\$15.00 — Expense

**00** Available Expenses →

You currently have no available expenses.

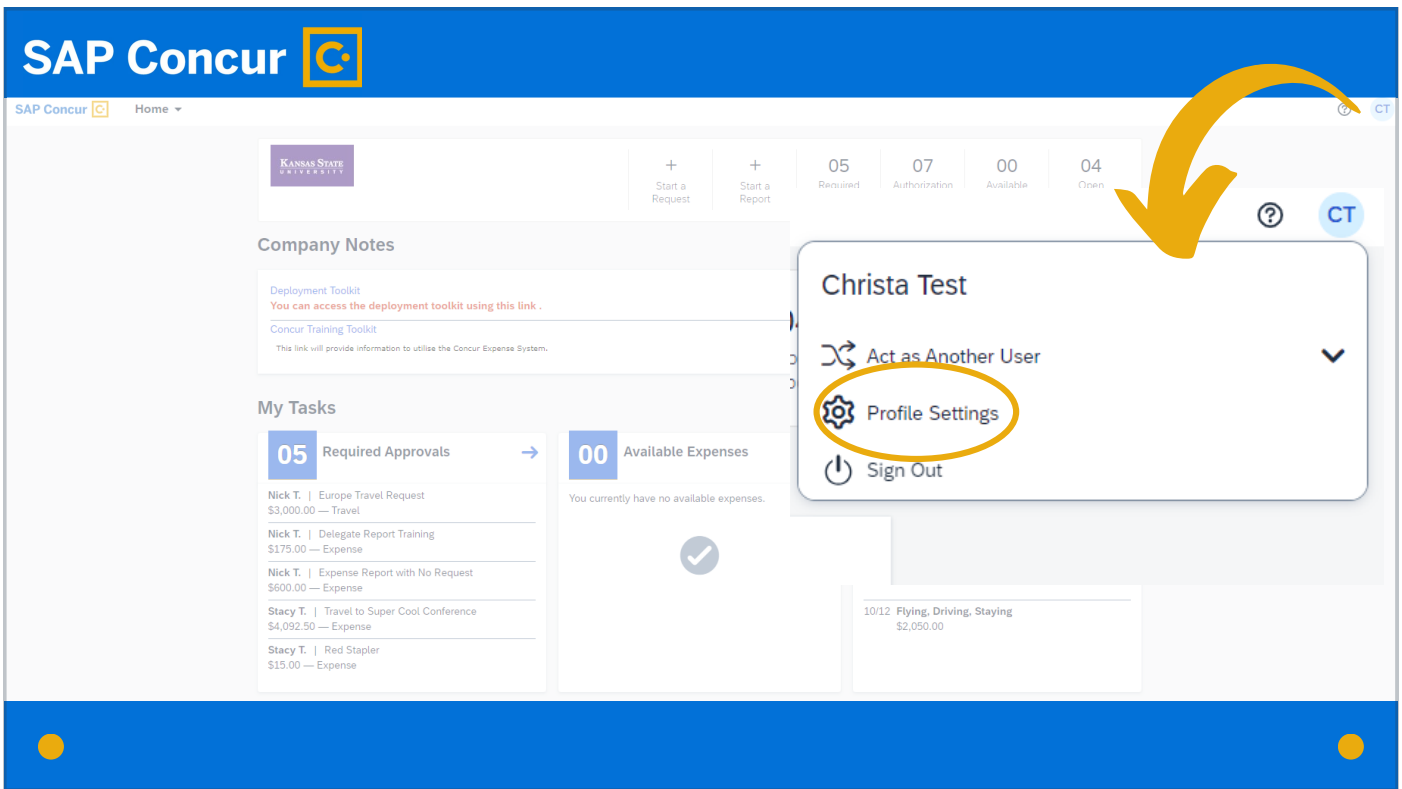


**00** Open Reports →

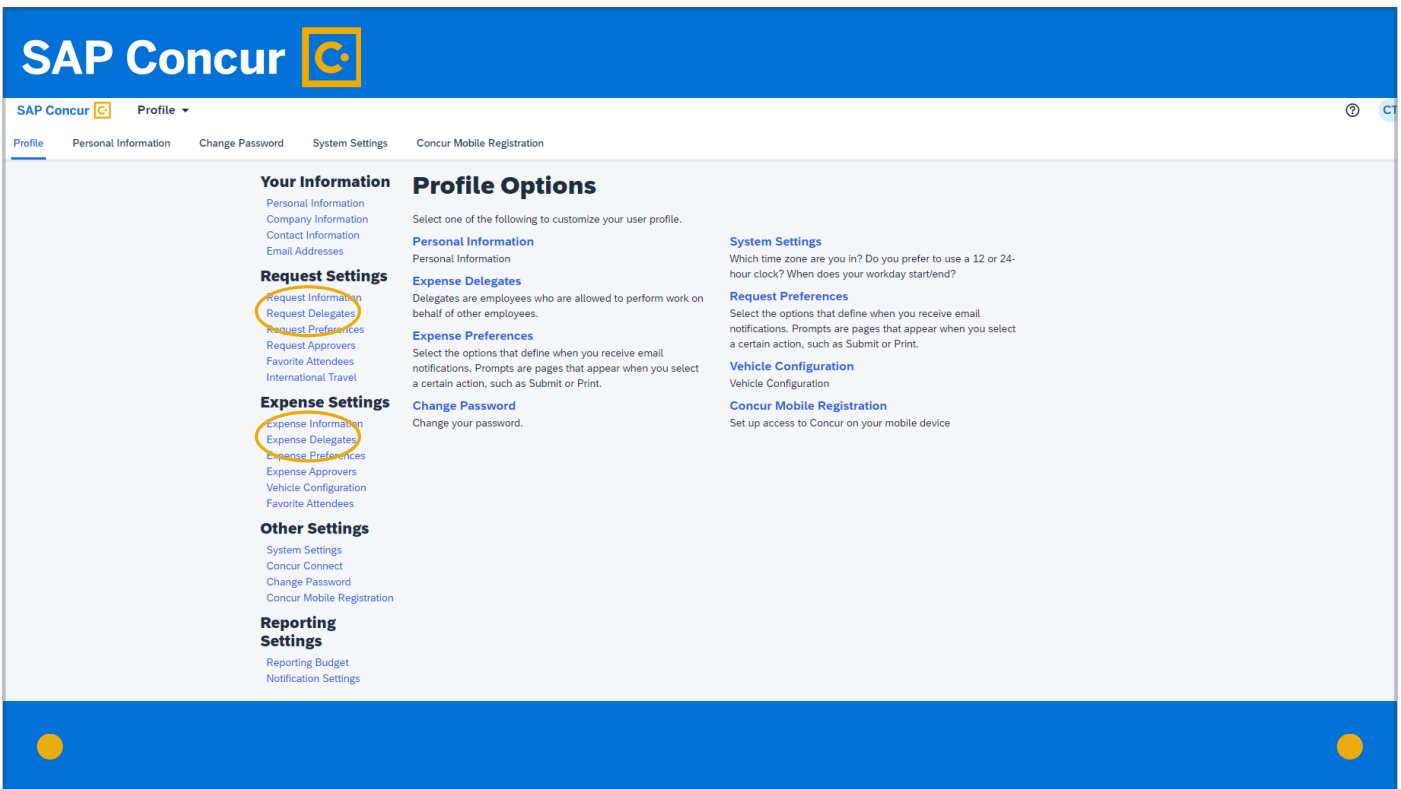
You currently have no open reports.



or a person who has permission to review and approve requests or reports on behalf of an approver.



The delegate information for each Concur user can be found by clicking on the profile icon in the top right corner of any Concur screen and going to Profile Settings.



This opens the Profile Options screen, where you can access the delegate information from the left menu either under Request Delegates or Expense Delegates.

## Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses

## Request Settings

- Request Information
- Request Delegates
- Request Approver
- Favorites Attendees
- International Travel

## Expense Settings

- Expense Information
- Expense Delegates

## Request Delegates

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](#)

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 Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
--------------------------	------	-------------	-------------------	-----------------	-------------	-----------------------	--------------------------	--------------------------

No records found.

Although there are individual links to delegates for requests and delegates for expenses, the request and expense delegates are not unique; assigning a delegate to requests assigns it to expenses as well and vice versa.

**Your Information**

- Personal Information
- Company Information
- Contact Information
- Email Addresses

## Request Delegates

Delegates Delegate For

**Request Settings**

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees
- International Travel

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

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 Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
--------------------------	------	-------------	-------------------	-----------------	-------------	-----------------------	--------------------------	--------------------------

No records found.

**Expense Settings**

- Expense Information
- Expense Delegates

You can see the delegates assigned to the user



## Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses

## Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees
- International Travel

## Expense Settings

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Vehicle Configuration
- Favorite Attendees

## Other Settings

- System Settings
- Concur Connect
- Change Password
- Concur Mobile Registration

## Request Delegates

Delegates | Delegate For

[Delete](#)

This employee may act as a delegate for the listed employees.

Name

Test, Aaron  
Aaron.Test@k-state.edu.usat

Test, Britt  
Britt.Test@k-state.edu.usat

Test, Ed  
Ed.Test@k-state.edu.usat

Test, Memory  
Memory.Test@k-state.edu.usat

Test, Michelle  
Michelle.Test@k-state.edu.usat

Test, Nick  
Nick.Test@k-state.edu.usat

## Request Delegates

Delegates | Delegate For

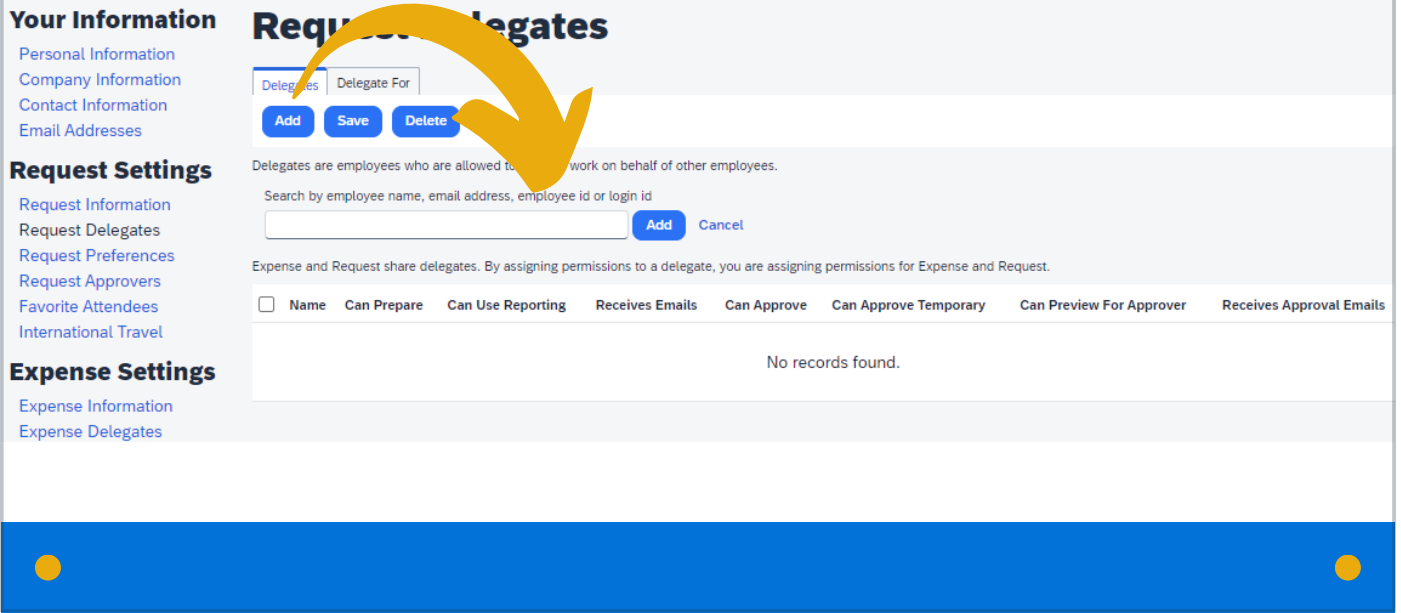
[Delete](#)

This employee may act as a delegate for the listed employees.

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

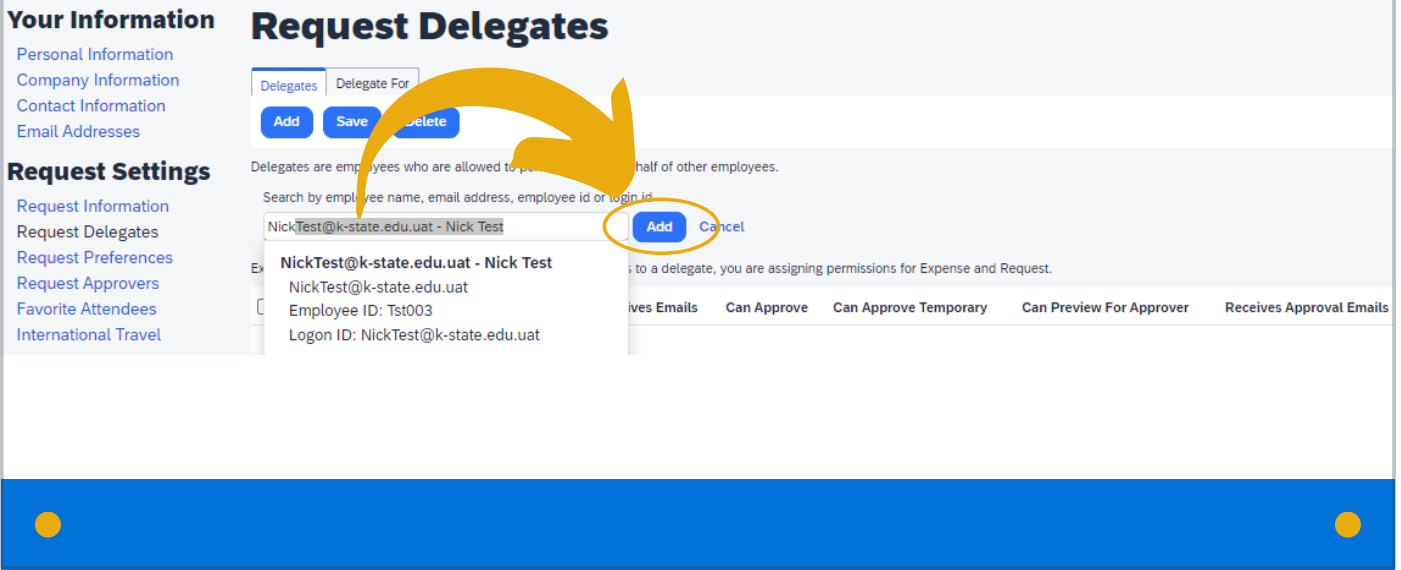
Name	Expense	Request	Expense	Request	Expense	Request
Test, Memory Memory.Test@k-state.edu.usat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test, Michelle Michelle.Test@k-state.edu.usat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test, Nick Nick.Test@k-state.edu.usat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

and the people the user is a delegate for.



The screenshot shows the SAP Concur interface for managing Request Delegates. On the left, there are navigation menus for 'Your Information', 'Request Settings', and 'Expense Settings'. The main content area is titled 'Request Delegates' and includes a 'Delegates' dropdown menu, 'Add', 'Save', and 'Delete' buttons. A yellow arrow points to the 'Add' button. Below the buttons, there is a search field and an 'Add' button. A table with columns for Name, Can Prepare, Can Use Reporting, Receives Emails, Can Approve, Can Approve Temporary, Can Preview For Approver, and Receives Approval Emails is shown, with a message 'No records found.' below it.

To add a delegate, click the Add button. A search field will appear.



The screenshot shows the 'Request Delegates' page in SAP Concur. On the left, there are two main sections: 'Your Information' and 'Request Settings'. 'Your Information' includes links for Personal Information, Company Information, Contact Information, and Email Addresses. 'Request Settings' includes links for Request Information, Request Delegates, Request Preferences, Request Approvers, Favorite Attendees, and International Travel. The main content area is titled 'Request Delegates' and contains a search bar with the text 'Delegates' and 'Delegate For'. Below the search bar are buttons for 'Add', 'Save', and 'Delete'. A yellow arrow points from the 'Add' button to a search result. The search bar contains the text 'NickTest@k-state.edu.uat - Nick Test'. Below the search bar, there is a table of search results. The first result is 'NickTest@k-state.edu.uat - Nick Test' with the following details: NickTest@k-state.edu.uat, Employee ID: Tst003, and Logon ID: NickTest@k-state.edu.uat. The 'Add' button next to this result is circled in yellow. Below the table, there are several checkboxes for permissions: 'Receives Emails', 'Can Approve', 'Can Approve Temporary', 'Can Preview For Approver', and 'Receives Approval Emails'.

You can search by a person's name, email address, employee ID, or logon ID. Once you find that person, click the Add button.

**Your Information**

- Personal Information
- Company Information
- Contact Information
- Email Addresses



**Request Settings**

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorites Attendees
- International Travel

## Expense Delegates

Delegates Delegate For  
**Add Save Delete**

Delegates are employees who are allowed to perform work on behalf of other employees. 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 Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Appro Emails
<input type="checkbox"/>	Test, Nick NickTest@k-state.edu.uat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>  <input type="checkbox"/> 	<input type="checkbox"/>	<input type="checkbox"/>

To assign permissions to that delegate, check the box to the left of their name and then check the boxes of the desired permissions.

**Your Information**

- Personal Information
- Company Information
- Contact Information
- Email Addresses

**Request Settings**

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees
- International Travel

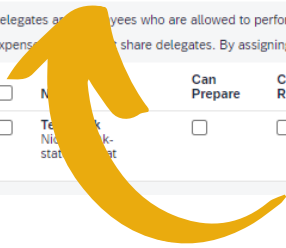
## Expense Delegates

Delegates Delegate For


**Add Save Delete**

Delegates are employees who are allowed to perform work on behalf of other employees. Expense Delegates can share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>		Can Prepare	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	N...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Te... Nik... stat... stat...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



When finished, click Save.



	+ Start a Request	+ Start a Report	01 Required Approvals	00 Authorization Requests	00 Available Expenses	00 Open Reports
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### Company Notes

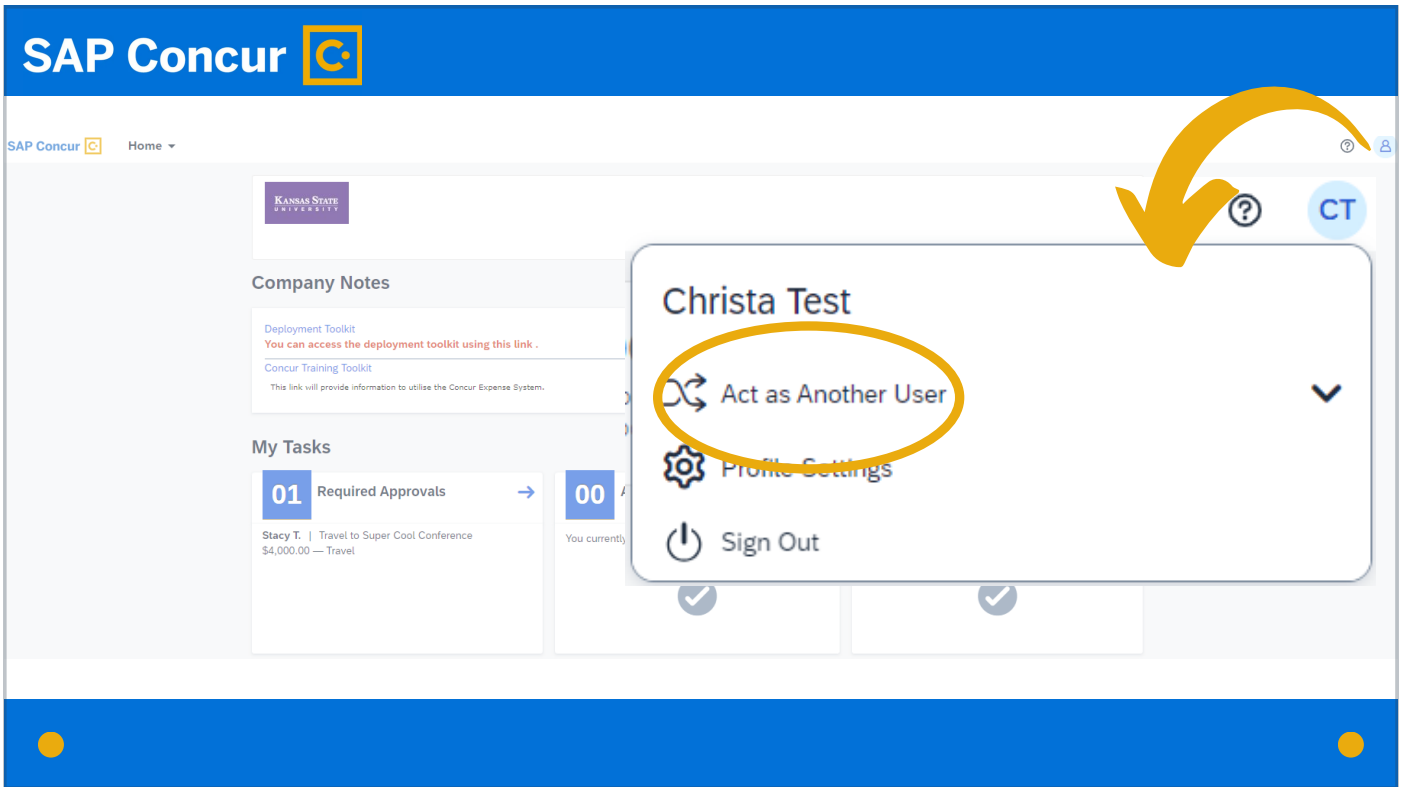
[Deployment Toolkit](#)  
You can access the deployment toolkit using this link .

[Concur Training Toolkit](#)  
This link will provide information to utilize the Concur Expense System.

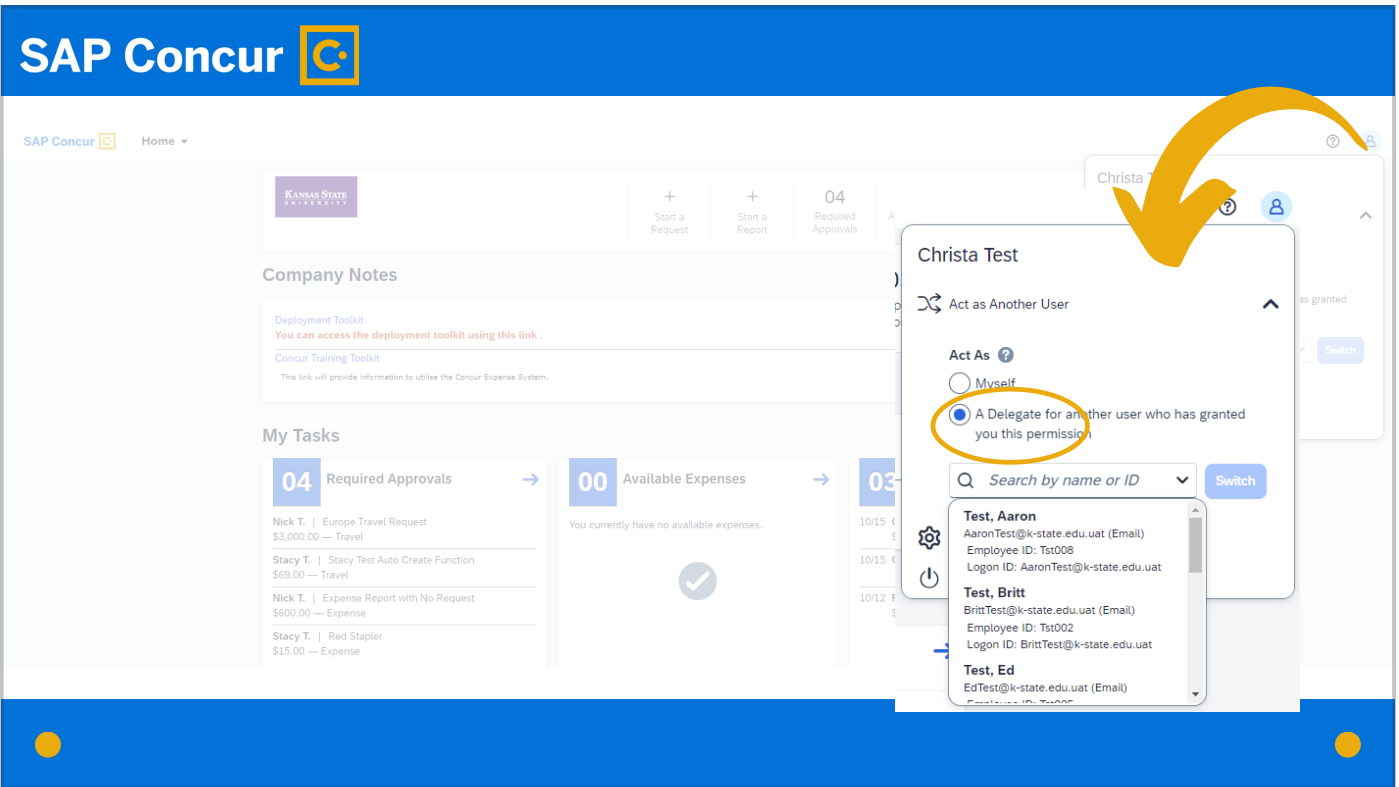
### My Tasks

<b>01</b> Required Approvals → Stacy T.   Travel to Super Cool Conference \$4,000.00 — Travel	<b>00</b> Available Expenses → You currently have no available expenses. 	<b>00</b> Open Reports → You currently have no open reports. 
---	--	--

If you are the delegate assigned to another user, to act as that user you will first log in to Concur as yourself.

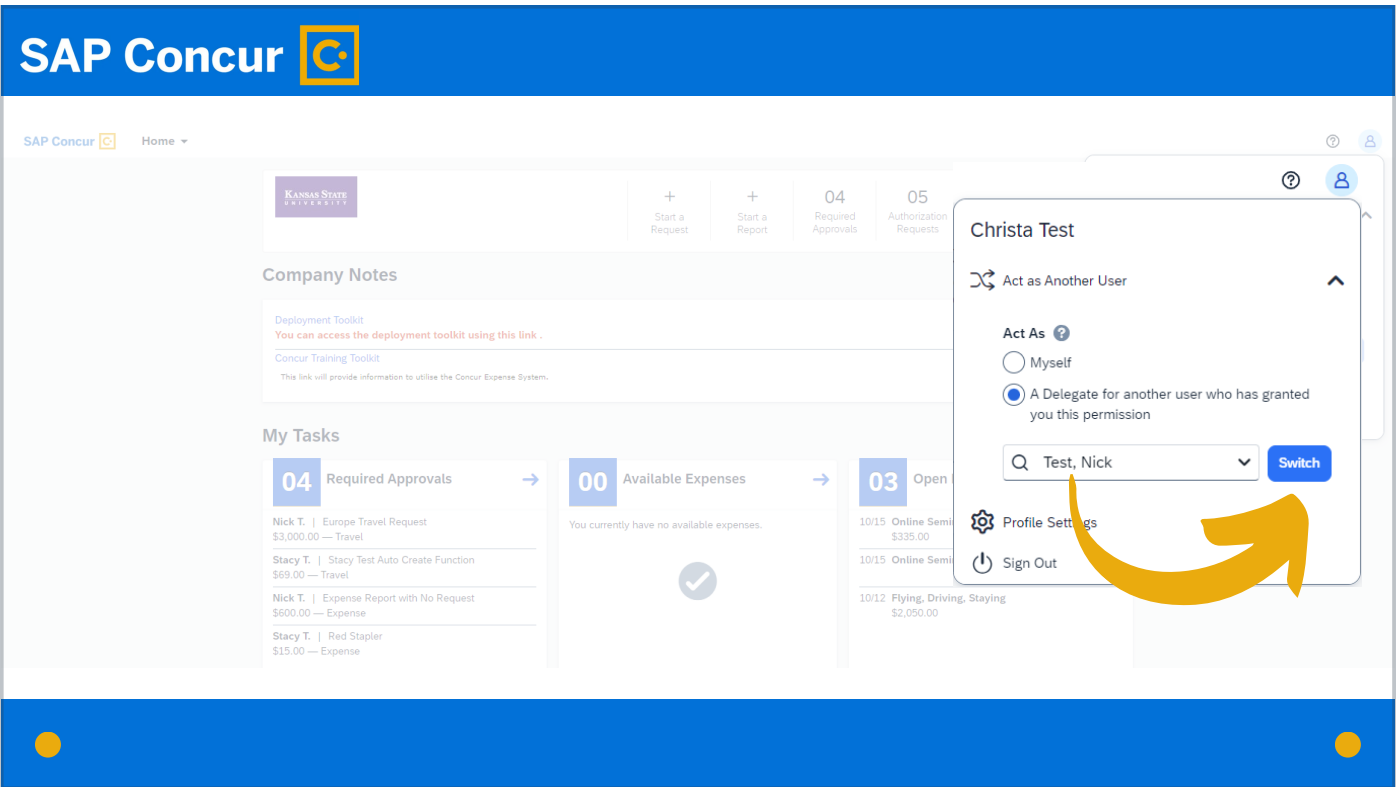


Then, from your profile icon in the top right corner of the screen, you will select Act as Another User.








Select the delegate option and search for the appropriate person.





Once you have selected that person, click the Switch button to switch to that person's profile.






-  Start a Request
-  Start a Report
-  01 Required Approvals
-  06 Authorization Requests
-  00 Available Expenses
-  01 Open Reports



### Company Notes

Deployment Toolkit  
**You can access the deployment toolkit using this link .**  
Concur Training Toolkit  
This link will provide information to utilize the Concur Expense System.

### Tasks

-  01 Required Approvals →  
Christa T. | September Conference  
\$391.48 — Travel
-  00 Available Expenses →  
User currently has no available expenses.
-  01 Open Reports →  
10/10 Test Video  
\$75.98

The profile icon in the top right corner will change to a green button that tells you that you are acting as another user.



+  
Start a  
Request

+  
Start a  
Report

01  
Required  
Approvals

06  
Authorization  
Requests

00  
Available  
Expenses

01  
Open  
Reports

## Company Notes

Deployment Toolkit

You can access the deployment toolkit using this link .

Concur Training Toolkit

This link will provide information to utilise the Concur Expense System.

## Tasks

01 Required Approvals →

Christa T. | September Conference  
\$391.48 — Travel

00 Available Expenses →

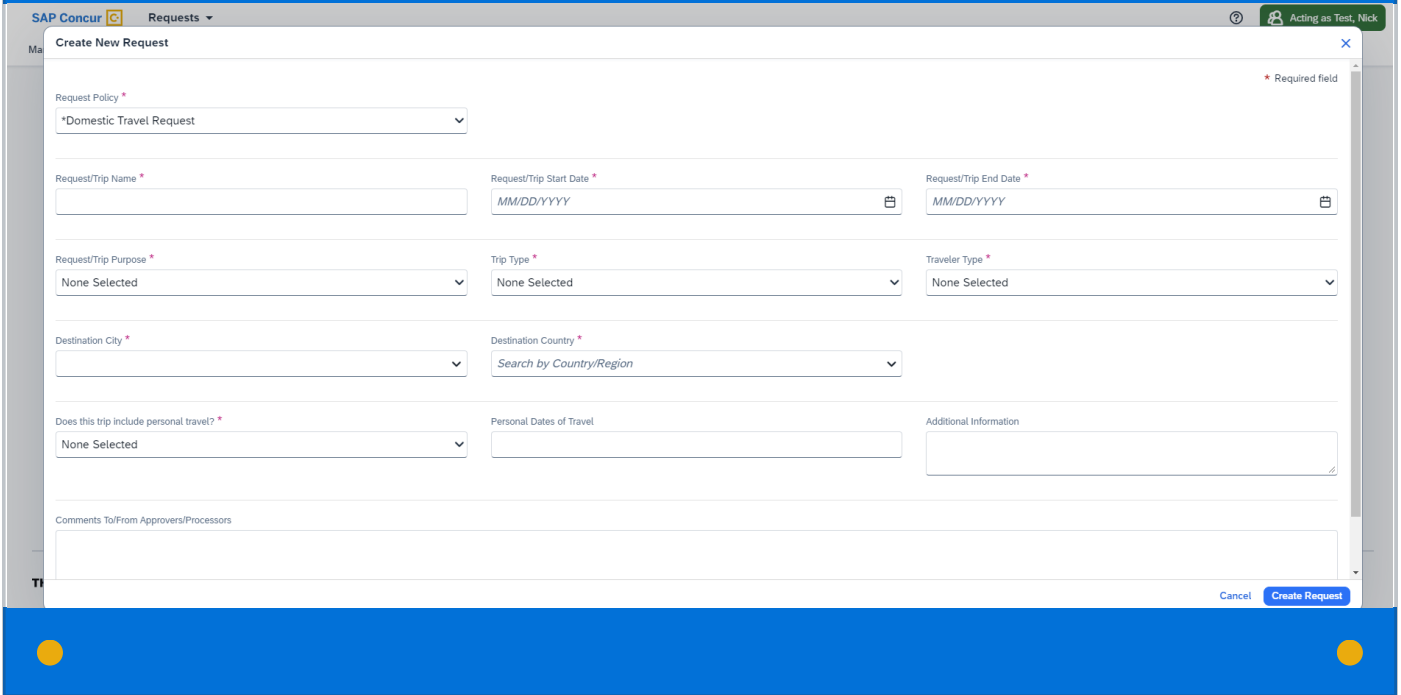
User currently has no available expenses.

01 Open Reports →

10/10 Test Video  
\$75.98



You will see that user's dashboard and can access any of that user's approvals, travel requests, and/or expense reports that you have been authorized to be responsible for.



The screenshot shows the 'Create New Request' form in SAP Concur. The form is titled 'Create New Request' and has a close button in the top right corner. The form is divided into several sections:

- Request Policy:** A dropdown menu with 'Domestic Travel Request' selected.
- Request/Trip Name:** A text input field.
- Request/Trip Start Date:** A date picker with the format 'MM/DD/YYYY'.
- Request/Trip End Date:** A date picker with the format 'MM/DD/YYYY'.
- Request/Trip Purpose:** A dropdown menu with 'None Selected' selected.
- Trip Type:** A dropdown menu with 'None Selected' selected.
- Traveler Type:** A dropdown menu with 'None Selected' selected.
- Destination City:** A text input field.
- Destination Country:** A dropdown menu with 'Search by Country/Region' selected.
- Does this trip include personal travel?:** A dropdown menu with 'None Selected' selected.
- Personal Dates of Travel:** A text input field.
- Additional Information:** A text area for additional details.
- Comments To/From Approvers/Processors:** A text area for comments.

At the bottom right of the form, there are two buttons: 'Cancel' and 'Create Request'.

The process for approving requests or reports or creating them is almost completely synonymous with the process for approving or creating requests or reports for yourself. For full details on those topics, please refer to our Travel requests, Expense Reports, and/or Approvals training videos.



## Chicago Conference \$950.00

Not Submitted | Request ID: 3379

Copy Request

Notify Employee

Request Details ▾ | Print/Share ▾ | Attachments ▾ | Manage Travel Allowance ▾

### CASH ADVANCES: 1

Amount  
\$0.01

### EXPECTED EXPENSES

[Add](#) [Edit](#) [Deletes](#) [Allocate](#)

<input type="checkbox"/>	Expense type↑↓	Details↑↓	Date↑↓	Amount↑↓	Requested↑↓
<input type="checkbox"/>	Hotel		12/04/2023	\$450.00	\$450.00
<input type="checkbox"/>	Travel-Related Training & Conference Registration		12/04/2023	\$500.00	\$500.00
					<b>\$950.00</b>

The difference you will experience as a delegate is that you cannot submit travel requests or expense reports. Submissions have to be done by the person who owns the request or report—whose profile it belongs to. So instead of seeing a Submit button when you are ready to turn in the request or report, you will see either a Notify Employee button for travel requests



## Delegate Report Training \$175.00

Not Submitted | Report Number: HWLRE3


[Delete Report](#) [Copy Report](#) [Ready For Review](#)

[Report Details](#) ▾ [Print/Share](#) ▾ [Manage Receipts](#) ▾


[View Available Receipts](#) 

[Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move to](#) ▾

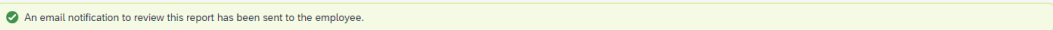
View:  ▾

<input type="checkbox"/>	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>		Out of Pocket	Job-Related Training And Webinar Fees (Non-travel)	Online Learning Co	10/16/2023	\$175.00
						\$175.00

or a Ready for Review button for expense reports.

SAP Concur Expense  Acting as Test, Nick

Manage Expenses

 An email notification to review this report has been sent to the employee.


## Delegate Report Training \$175.00

Ready For Review | Report Number: HWLRE3

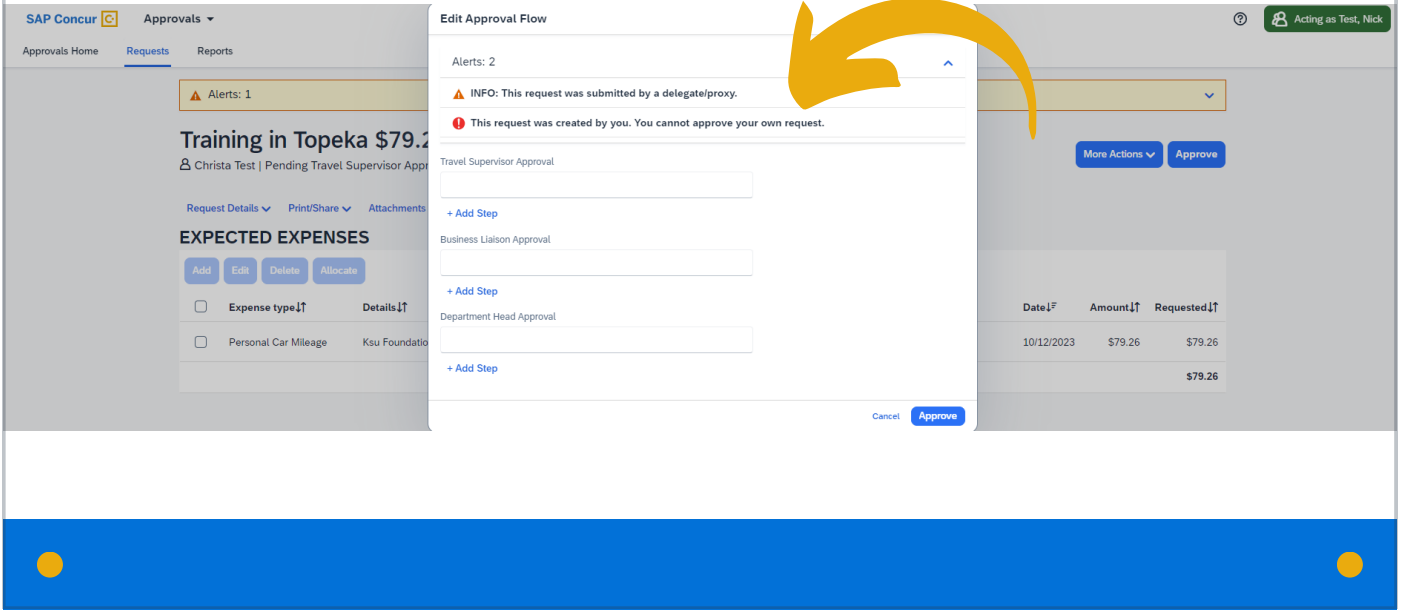
Delete Report Copy Report Not Ready For Review

Report Details Print/Share Manage Receipts View Available Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to View: Standard

<input type="checkbox"/>	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>		Out of Pocket	Job-Related Training And Webinar Fees (Non-travel)	Online Learning Co	10/16/2023	\$175.00
						\$175.00

Once you click on that button, an alert will generate near the top of the screen that tells you an email notification has been sent to the employee to review the request or report. It is then the responsibility of the employee to submit the request or report.



The screenshot displays the SAP Concur interface. On the left, a sidebar shows 'Approvals' with a dropdown menu. The main content area shows a request titled 'Training in Topeka \$79.26' with a status of 'Pending Travel Supervisor Approval'. A modal window titled 'Edit Approval Flow' is open in the center, showing a list of approval steps: 'Travel Supervisor Approval', 'Business Liaison Approval', and 'Department Head Approval'. A yellow arrow points to an alert message in the modal: 'INFO: This request was submitted by a delegate/proxy. This request was created by you. You cannot approve your own request.' The modal also includes a 'Cancel' button and an 'Approve' button. On the right, a table shows the request details:

Date	Amount	Requested
10/12/2023	\$79.26	\$79.26
		\$79.26

Also, on the approval side it is important to note that, as a delegate approver you cannot approve travel requests or expense reports that you created. The request or report must be approved by someone other than the person who created it.