Concur Travel Request & Expense Delegate Role
Delegate Role

- Delegates are assigned by an Employee through Concur Profile Settings/Profile Options
- Delegate Responsibilities can include
  - Build Requests and Expense Reports on behalf of an Employee
  - Preview Requests (TBAs) and Expense reports submitted for approval prior to final approval
  - Approve Requests & Expense Reports on behalf of an Approver in case of absence (only authorized Approvers can be an Approver Delegate)
To add a Delegate; Log into Concur, Select Profile -> Profile Settings -> Profile Options -> Expense Delegates.
Expense Delegates

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.

- Name: previewer, previewer@unisystem.edu
- Can Prepare: False
- Can View Receipts: False
- Receives Emails: False
- Can Approve: False
- Can Approve Temporary: False
- Can Preview For Approver: False
- Receives Approval Emails: False

Select Add
Begin typing the last name of the Employee that will be granted the Delegate Role

Select Add
Expense Delegate Role – Permission Options

To select the type of permissions to be granted to a Delegate; Select the appropriate check boxes. Then Select Save

“Can Prepare” – Allows the Delegate to prepare Requests and Expense Reports on the Employee’s behalf.

“Can View Receipts” – Concur will automatically check this box if “Can Prepare” is selected.
Expense Delegate Role – Permission Options Continued

“Can Preview For Approver” – Allows the Delegate to perform an initial review and then notify the Approver when completed or send report back to the Employee for more information. This role cannot approve Requests or Reports.

“Can View Receipts” – Concur will automatically check this box if “Can Preview” is selected.
Expense Delegate Role – Permission Options Continued

“Receives Emails” – Allows the Delegate to receive email notifications and status updates for Requests and Expense Reports.

“Receives Approval Emails” – Allows the Delegate to receive notification of pending Approval emails.
“Can Approve” – Allows the Delegate to receive email notifications of Approved Requests and Expense Reports. NOTE: Only authorized Approvers can be given this role.

“Can View Receipts” – Concur will automatically check this box if “Can Approve” is selected.
“Can Approve Temporary” – Allows the Delegate to receive email notifications of Approved Requests and Expense Reports for a specified time period. NOTE: Only authorized Approvers can be given this role.

“Can View Receipts” - Concur will automatically check this box if “Can Approve” is selected.
To remove or replace a Delegate:

Select the checkbox next to the name of the Delegate.

Then Select the Delete option.
Travel Assistants

• Concur Travel Assistant Role is not a Delegate Role option.
• Travel Assistants are given authority to access an Employee’s Concur profile to book Travel through Concur on their behalf.
• For additional information on how to set up a Travel Assistant, please go to untsystem.edu/concurtravel
Thank You

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