



Concur Delegate and Special Review/Approval Situations

The Concur Expense module has been set-up to allow for users to set-up delegates. Delegates can be set-up to support several key functions, including preparing an expense report, reviewing an expense report, previewing on behalf of an approver, as well as approving if the approver is unavailable.

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To set-up a Delegate to prepare and edit an expense report

This would be for the TCU user who has someone within the department that can support entering in the expenses, as well as checking the BU/Fund/Department coding. The user is still expected to submit the expense report. The TCU user would need to communicate with the delegate outside of Concur as to when the report was ready to be completed and/or updated.

1. Click on **Profile**
2. Select **Profile Settings**
3. Select **Expense Delegates**
4. Select **Add**
5. Search and select the person you wish to add as a delegate
6. Select the following permissions

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

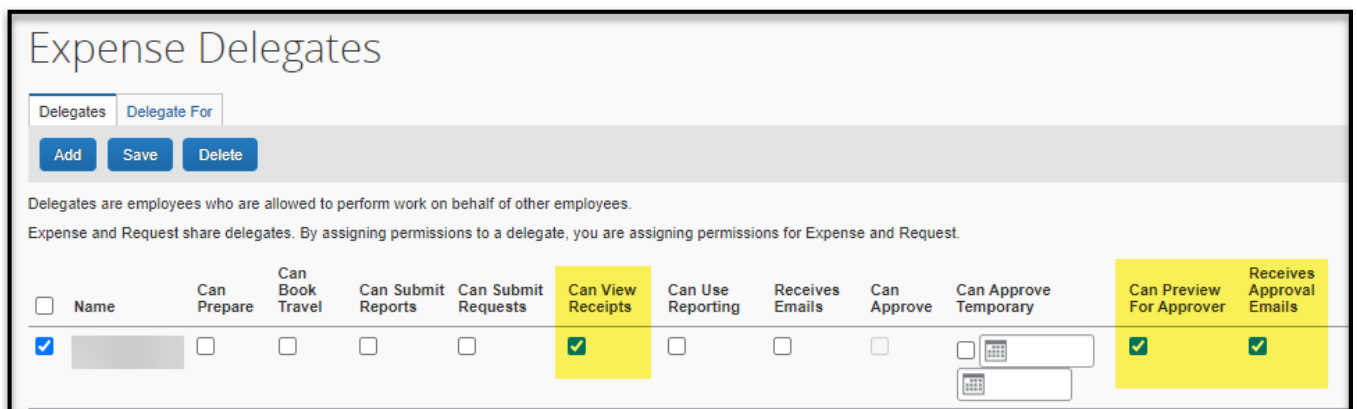
☐ Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
☐ [Redacted]	☒	☒	☒	☒	☒	☐	☒	☐	☐ [Calendar Icon]	☐	☐

Additional Information on Delegate set-up is included in the [Getting Started with SAP Concur – Quick Reference](#)

To set-up a Delegate Previewer to review an expense report prior to approval

This would be for the TCU approver who has someone that would preview the expense report in advance of approval. The previewer would have the ability to send the report back to the user for correction and resubmission.

1. Click on **Profile**
2. Select **Profile Settings**
3. Select **Expense Delegates**
4. Select **Add**
5. Search and select the person you wish to add as a delegate
6. Select the following permissions



The screenshot shows the 'Expense Delegates' interface. At the top, there are tabs for 'Delegates' and 'Delegate For'. Below the tabs are buttons for 'Add', 'Save', and 'Delete'. A descriptive text states: '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.' Below this is a table with columns for various permissions. The first row is a header, and the second row shows a delegate with several permissions checked, including 'Can View Receipts', 'Can Preview For Approver', and 'Receives Approval Emails'.

☐	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
☒		☐	☐	☐	☐	☒	☐	☐	☐	☐	☒	☒

To set-up a Delegate Approver

This would be for the TCU approver who will be unavailable to approve and temporarily is setting up a delegate to approve on their behalf. This is for ALL approvals. A user must have the 'approver' role in Concur to be set-up a Delegate Approver. An optional setting allows for temporary approval start and end dates.

1. Click on **Profile**
2. Select **Profile Settings**
3. Select **Expense Delegates**
4. Select **Add**
5. Search and select the person you wish to add as a delegate
6. Select the following permissions

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.

☐	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
☒		☐	☐	☐	☐	☒	☐	☐	☒	☐	☐	☒

Optional - Start/End Dates

To add an ad-hoc approver (User)

This would be for the TCU user that needs to add an additional approver to the approval workflow. This ad-hoc approver does not replace the approval steps defined in Concur. If an approver is added that is already in the defined approval – that approver would receive the expense report twice to approve.

1. Within the expense report, select **Report Details** → **Report Timeline**
2. Select **Edit**

Report Timeline

AR:Hotel test | \$0.00

Approval Flow

Edit

3. Select **+Add Step**, either before or after the defined approval steps

Edit Approval Flow

+ Add Step

Cost Object Approval

+ Add Step

Cancel
Save

4. Search for the approver you wish to add in the **User-Added Approver** field

Edit Approval Flow

[+ Add Step](#)

User-Added Approver *

Last Name Search by Last Name

Last Name
First Name
Email Address
Login ID
Employee ID

5. Click **Save**
6. Note that the User-Added Approver step is now showing in the Approval Flow, select **Close**

