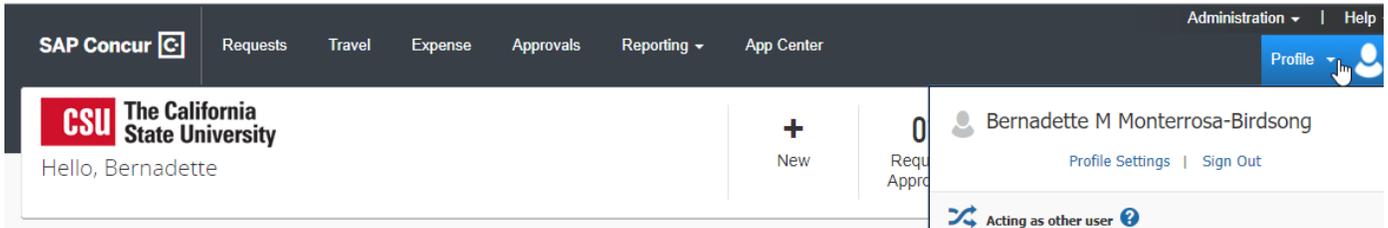


ASSIGNING DELEGATES IN CONCUR USER GUIDE



CAL POLY

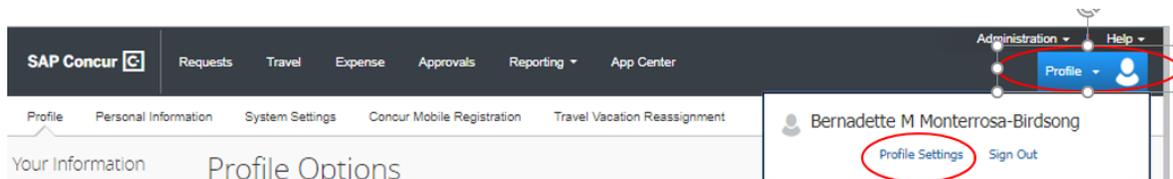
Strategic Business Services

ADMINISTRATION & FINANCE

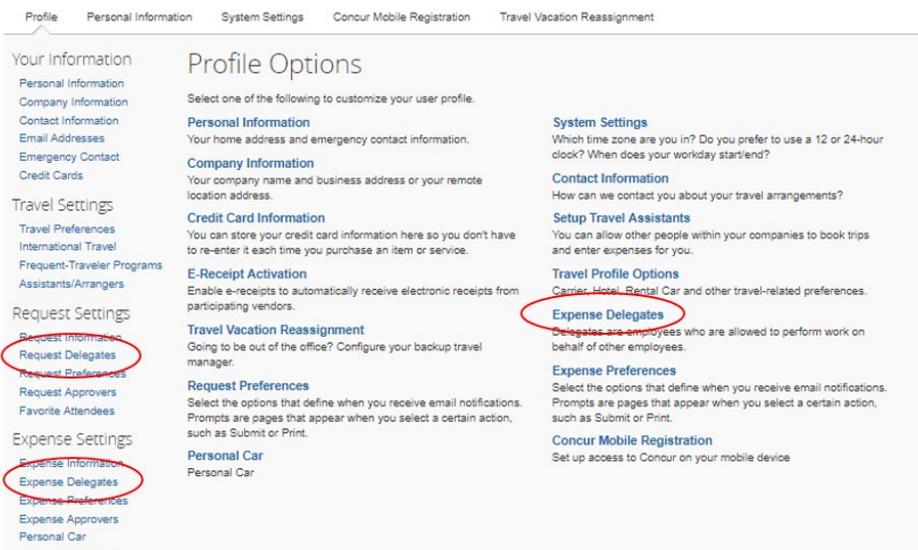
This guide will show you how to assign a Delegate to:

- prepare Request and Expense Reports
- review incoming Requests and Expense Reports for approval
- receive your emails from the system
- pull travel reports on your direct reports

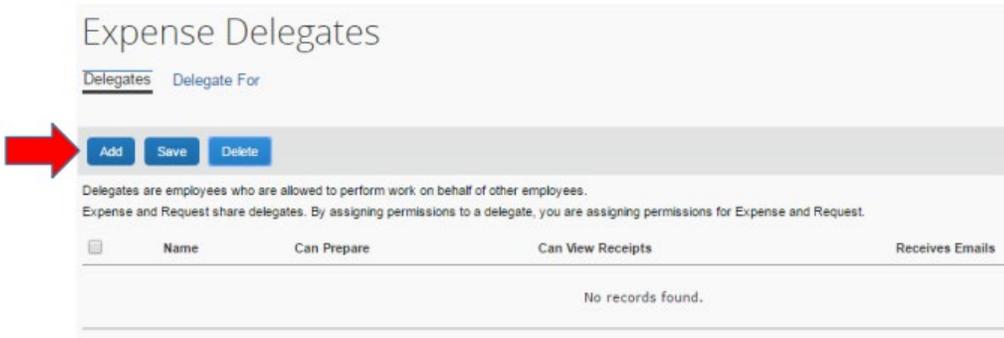
1. Go to your Profile Settings.



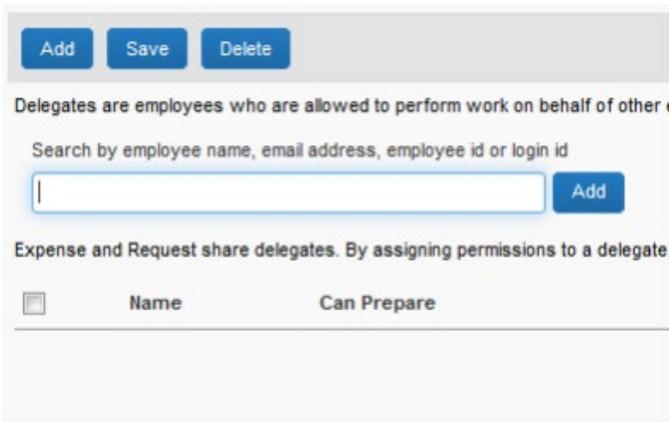
2. Go to **Request Delegate** or **Expense Delegate** (note, what you do in Expense will be reflected in Request, therefore you only have to set up the person once and they will be delegate for both Request and Expense).



3. In **Expense Delegates**, Click on **Add**.



4. Type a few first letters of the last name of the employee you would like to delegate (the person must have a Concur profile).



5. Select the permissions you want your delegate to have and then click the **Save** button, next to **Add** button.

Preparer Role

Can Prepare

Preparer can prepare Request & Expense Reports on behalf of traveler; View receipts auto

TBD Phase 2

Can Use Reporting

Delegate can pull reports for approver's direct reports. 2 delegates only

Approver Role²

Can Approve

Approver can approve on behalf of an approver temporarily (vacation) or permanently **Only when** they are a manager or confidential, this requires approval rights

Previewer Role²

Can Preview for Approver

Previewer can review any Request or Expense Report submitted for the approver. They can do everything the approver can, except hit (final) approve button

Receives Approval Emails

Previewer receives all emails that are sent to approver

Request Delegates¹

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 View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Emyan, Mariam memyan@calpoly.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
<input type="checkbox"/>	Fein, Brian bfein@calpoly.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

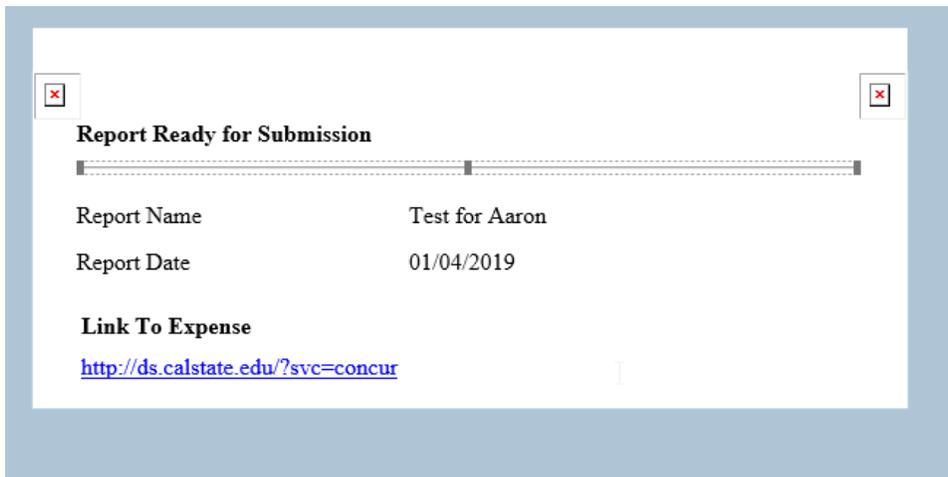
¹ Request Delegate = Expense Delegate

² Approver capabilities

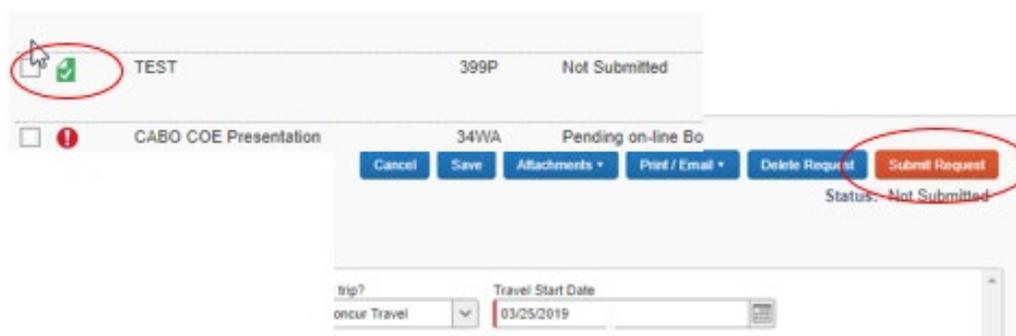
6. Once the employee is selected and the permissions granted, the employee can now act on behalf of the traveler for Request and Expense (see Delegated employee for details).

AFTER DELEGATE PREPARES A REQUEST AND/OR EXPENSE REPORT, YOU WILL BE NOTIFIED

1. You will receive an email notification.



2. For **Requests**, go to **Manage Request** queue, click on the icon to see the prepared **Request**. Upon review, click on **Submit**.



3. For **Expense Reports**, go to Active Reports section in **Expense**, click on the **Ready for Review** icon. Upon review, click on **Submit**.

NOT SUBMITTED	NOT SUBM
Test for Aaron 01/04/2019	TEST E 11/21/201
\$465.12	\$0.00
 Exceptions	
 Ready for Review	
NOT SUBMITTED	