

## Understanding Delegates

This Quick Reference Guide explains how Expense Delegates and Approval Delegates in Concur are set up, and how the delegate access functions.

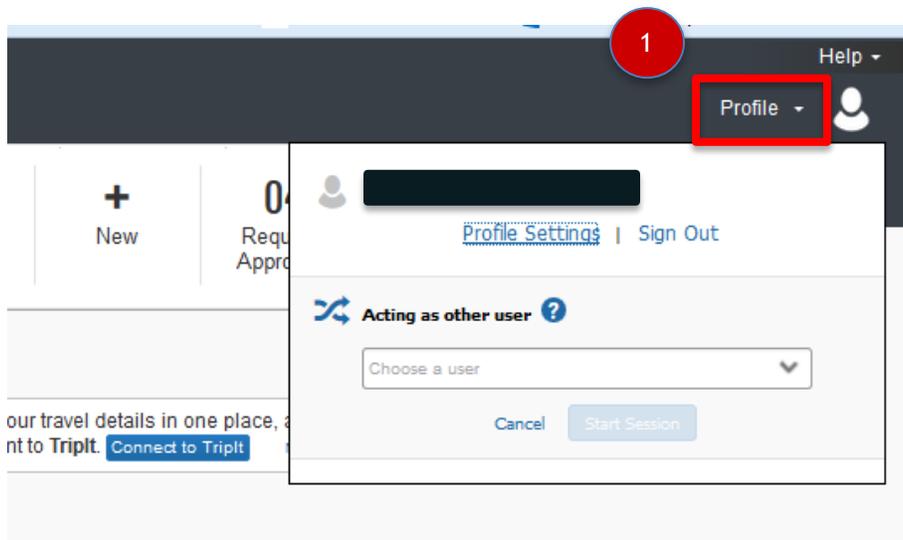
### Part One: Expense Delegates

**Expense reports in Concur exist uniquely in the profile of the report owner and cannot be transferred to a different account; this means that in order for one employee to prepare a report for another, they must be set up as an Expense Delegate by the report owner.**

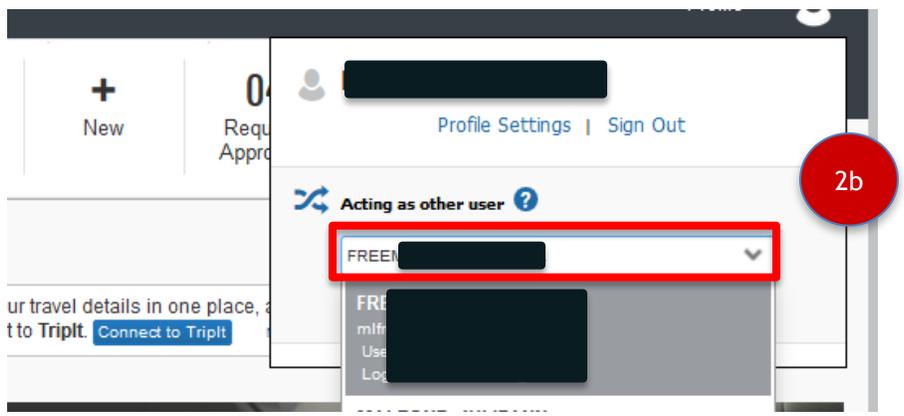
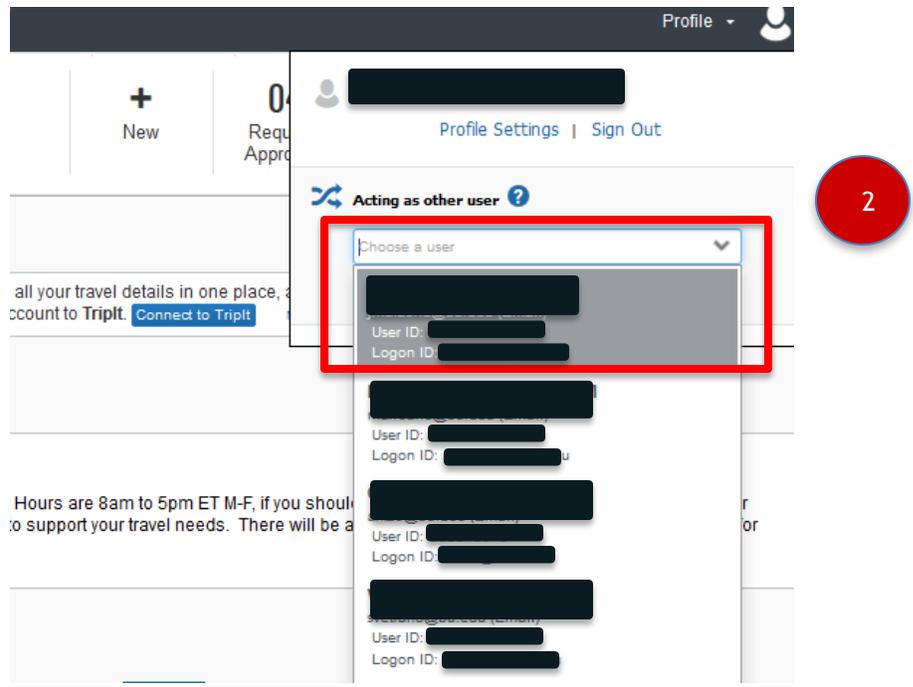
**Expense Delegates are employees who are allowed to perform work on behalf of other employees.**

To set up an expense delegate, employees should visit [this QRG](#)

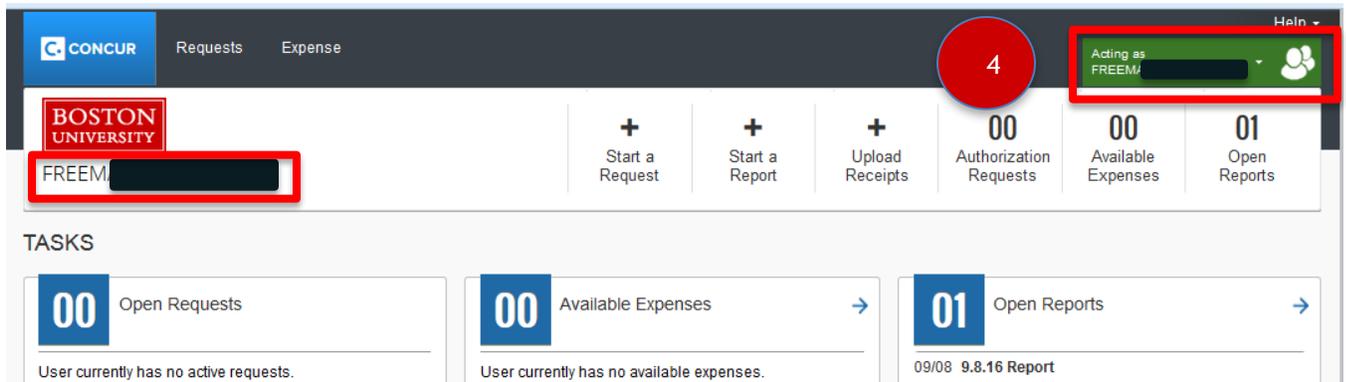
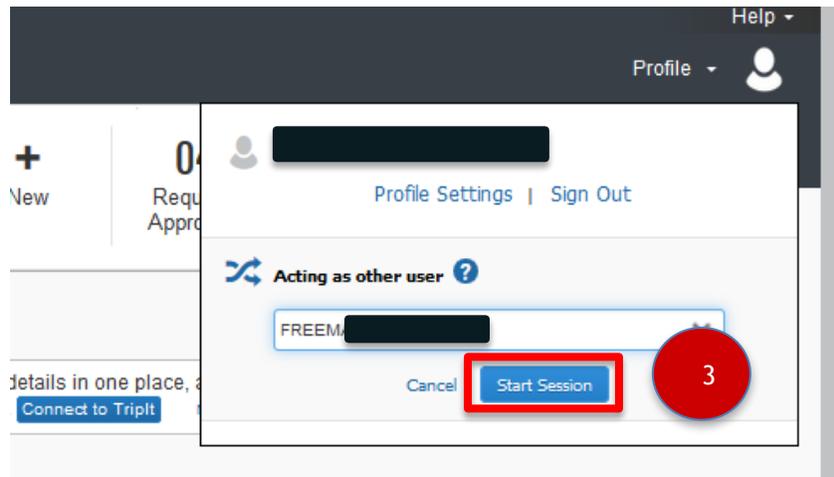
Once you have been set up as an expense delegate for another employee, to prepare a report for them you will first need to access their account:



1	Start by clicking the Profile drop down in the upper right hand corner
2	A drop down box will appear below “Activing as other user” – depending on the number of people you are set up as a delegate for a list of available users may populate. If you are a delegate for a very large number of people, you should begin typing the desired user’s name in the box and then the list will populate.



3	Select the user from the drop down list- then hit “Start Session”
4	The upper right hand corner will now display “Acting As_____” and that employee’s name will be displayed under the Boston University logo on the left hand side. It is now safe to begin working on an expense report for that employee.



**If an expense report is mistakenly prepared in the incorrect employee's profile- the report cannot be transferred to a different account. It must be deleted and recreated in the correct profile.**

## Part Two: Approval Delegates

**Similarly, unlike Shopping Carts which can exist in the worklist of multiple approvers at once, when an expense report is submitted in Concur it follows a pre-determined workflow that feeds in from SAP. This means that in order to approve a report on someone's behalf, you must be set up as their Approval Delegate.**

## 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 Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	[Redacted]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	[Redacted]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Approval delegates are set up in the same procedure as [expense delegates](#), however the only boxes necessary are “Can View Receipts,” and “Can Approve.” The “Receives Approval Emails” box should also be checked if the approval delegate would like to be notified when reports are waiting for Approval.

Approval Delegates can also be set up for a specific time frame by using the “Can Approve Temporary” function- in the event an approver would like someone to approve the reports waiting their approval while they will be out of the office or on vacation.

Individuals who are set up as an approval delegate only will not see the Expense or Travel tabs when accessing the profile of the individual for whom they are an approval delegate- they will only see the reports currently requiring that employee’s approval:

The screenshot shows the Concur 'Approvals' page. At the top, there is a navigation bar with the Concur logo and 'Approvals' text. On the right, it says 'Acting as' followed by a user profile icon. Below the navigation bar, there is a large blue box with the Concur logo and a redacted name. To the right of this box, it displays '04 Required Approvals'. Below this, there is a 'TASKS' section with a blue box containing '04 Required Approvals' and a right-pointing arrow. The main content area shows a list of four approval items, each with a redacted name, a description, and an amount:
 

- [Redacted] | Dr. Derek Greenfield Visit | \$504.87 — Expense
- [Redacted] | Camp Merriwood/UConn | \$541.63 — Expense
- [Redacted] | Preseason: Per Diem | \$435.58 — Expense
- [Redacted] | e-Season: Per Diem | \$208.59 — Expense