What is a Delegate?

A delegate is an individual authorized to process expense reports, in the Concur Travel & Expense System, on behalf of another person.

Delegates are not policy specific – that is, as a delegate you can process both Procurement Card expense reports and Travel Reconciliation expense reports on behalf of the individual for whom you are a delegate. It is up to you and the individual to identify which type(s) of expense reports you should actually process.
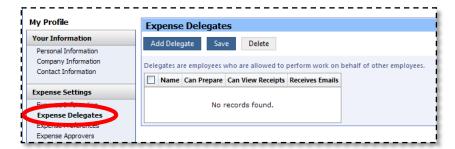
There are two types of delegates:

- A Prepare Delegate can prepare expense reports for another individual.

- An Approve Delegate can approve expense reports on behalf of another individual. (To be an Approve Delegate, you must already have approval authority.)

> Delegates are assigned for expense report processing, while travel arrangers are assigned for travel processing. Delegates and travel arrangers are not necessarily the same people. An individual can be just a delegate, just a travel arranger, or both a delegate and a travel arranger.

Accessing Your Expense Delegates Page

Delegates are identified on the EXPENSE DELEGATES page, which is located under your Concur Profile.

1. Begin by accessing Concur via [your campus portal](). Locate your **CU Resources** section and, under the **Business Applications** area, select the **Concur Travel & Expense System** link.

2. From your Concur home page, click **Profile** (upper left corner of your screen).

3. Click **Expense Delegates** (left-side menu).

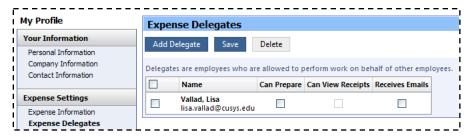If you already have delegates identified, they will appear here.

Adding Delegates

Note: If you have 25 or more delegates to add, you can instead submit the Delegate Authorization (DA) form.

To add someone to act on your behalf, whether it is as a Prepare Delegate or Approve Delegate, click **Add Delegate**. Search for the employee you wish to add as your delegate. You can search by name, employee ID, or email address.

Select your delegate from the resulting list.
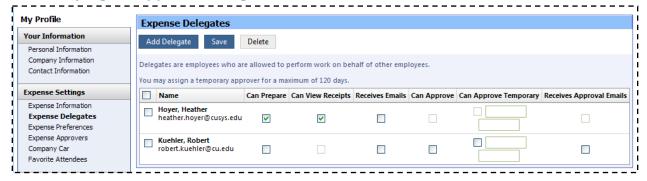
If identifying a Prepare Delegate…

Check the **Can Prepare** checkbox. The **Can View Receipts** checkbox will automatically appear checked as this gives your delegate the ability to view receipt images.

If you would like your delegate to receive emails from the Concur Travel & Expense System regarding your Concur tasks (such as status changes, reminder emails, etc.), also check the **Receives Emails** checkbox.

Click **Save**; a message will appear confirming your delegate has been saved.

If identifying an Approve Delegate…

An Approve Delegate can be assigned on a temporary or permanent basis. To set a permanent Approve Delegate, select **Can Approve**. Or, to set a temporary Approve Delegate, select **Can Approve Temporary** and use the calendar to set the temporary

approval timeframe. The **Can View Receipts** checkbox will automatically appear checked as this giver your delegate the ability to view receipt images.

If you would like your delegate to receive emails from the Concur Travel & Expense System regarding your Concur tasks (such as status changes, reminder emails, etc.), also check the **Receives Approval Emails** checkbox.
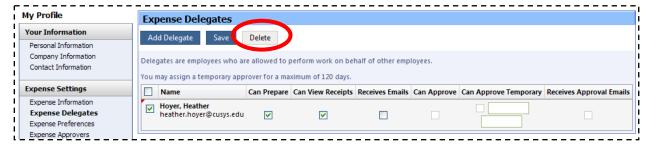
Click **Save**; a message will appear confirming your delegate has been saved.

> If the individual doesn't already have approval authority as part of his or her position, the approval checkboxes will be unavailable for selection (grayed out).

Deleting Delegates

Note: If you have 25 or more delegates to remove, you can instead submit the [Delegate Authorization (DA) form](#).

To remove someone from your delegate list because you no longer want him or her to act on your behalf:

Select the appropriate individual using the checkbox to the left of the individual's name and click **Delete**.

You will receive a pop-up message for verification. To remove the delegate from your list, click **OK**. A message will appear confirming your delegate has been removed from your list.