



SAP Concur Expense: Assign a Delegate Approver

Use this guide to help you assign a delegate approver for Travel Requests and Expense Reports via Concur Expense.

Accounts Payable & Travel

Revised Oct. 2021

Contents

- Overview 1
- Assigning a Delegate for Travel Requests & Expense Reports..... 1
- How to Approve as a Delegate..... 4

Overview

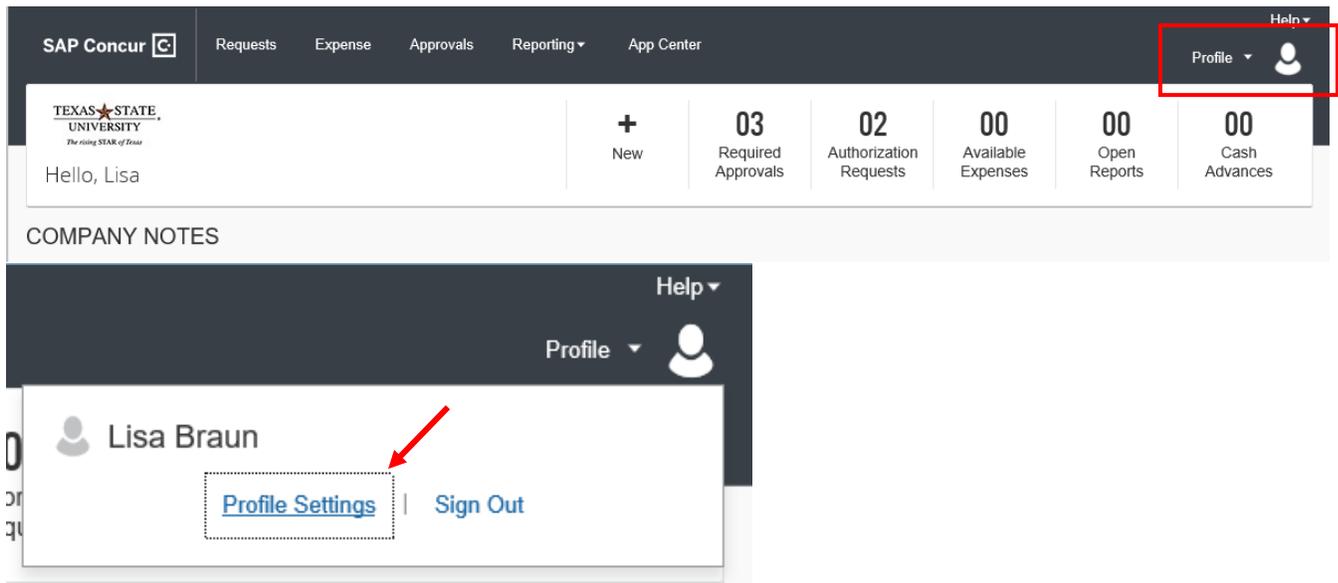
All business travel outside the employee’s designated headquarters (San Marcos or Round Rock, TX) requires pre-approval with the exception of Campus to Campus. When business travel has been authorized in advance, Texas State travelers are entitled to reimbursement for authorized allowable expenses incurred in accordance with Texas State policy and procedures during performance of official duties. If travel is not authorized in advance, the traveler assumes the risk that reimbursement may not be approved and may personally assume all liability for incidents occurred during travel.

Approvals are obtained at the request stage and are electronically assigned in a workflow originating from the traveler’s division, fund account(s) used, and trip schema.

The SAP Concur Expense system will encompass Travel Requests and Expense Reports for both employee and non-employee travelers. This document explains how a workflow approver can assign a delegate to approve or return a Travel Request or Expense Report on their behalf.

Assigning a Delegate for Travel Requests & Expense Reports

1. Click **Profile** in the top right hand corner of the homepage, then click **Profile Settings**.



- Click **Request Delegates** or **Expense Delegates** from the menu options on the left side of the screen.

Profile Personal Information Change Password System Settings Concur Mol

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses

Request Settings

- Request Information
- Request Delegates**
- Request Preferences
- Request Approvers
- Favorite Attendees
- International Travel

Expense Settings

- Expense Information
- Expense Delegates**
- Expense Preferences
- Expense Approvers
- Favorite Attendees

Profile Options

Select one of the following to customize your user profile.

Personal Information

Personal Information

Expense Delegates

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

Expense Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action such as Submit or Print.

- You will see the appropriate delegate screen based on the Request or Expense selection.

Request 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 permission

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve
No records found.						

Expense Delegates

Delegates Delegate For

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<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve
No records found.						

- Click **Add** to search by employee name, email address or NetID.

- Once the correct delegate is selected you will see them listed in the table below.
NOTE: This applies to both the Request Delegate and Expense Delegate screen.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails
<input type="checkbox"/>	Scheid, Cynthia CMS207@TXSTATE.EDU	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- By clicking on the **Delegate For** tab you are able to view the users for whom you work for as a delegate and the assigned tasks.

- Once a delegate has been added, you may select the assigned tasks for the delegate.
NOTE: Assigned tasks apply to both Travel Requests and Expense Reports.

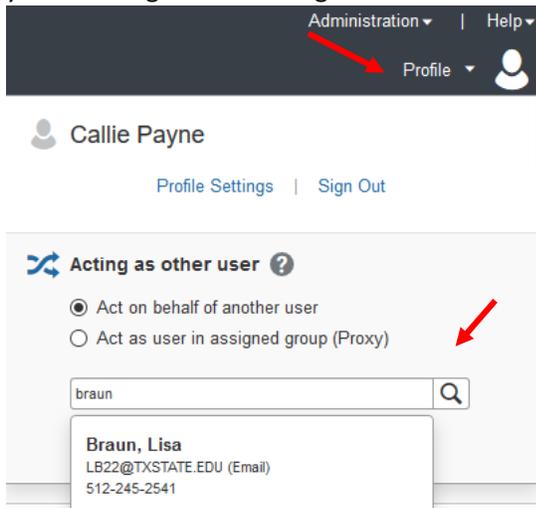
<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Scheid, Cynthia CMS207@TXSTATE.EDU	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>					

- Can Prepare** – Allows the delegate to create Travel Requests and Expense Reports for the approver.
- Can View Receipts** – Is automatically checked when Can Prepare is selected. Allows the delegate to view receipts when creating Travel Requests or Expense Reports for the approver.
- Can Use Reporting** – Allows the delegate to run reports on behalf of the approver.
- Receives Emails** – Allows the delegate to receive workflow status change notifications, email reminders, image received notifications, new company card transaction notifications and sent back notifications.

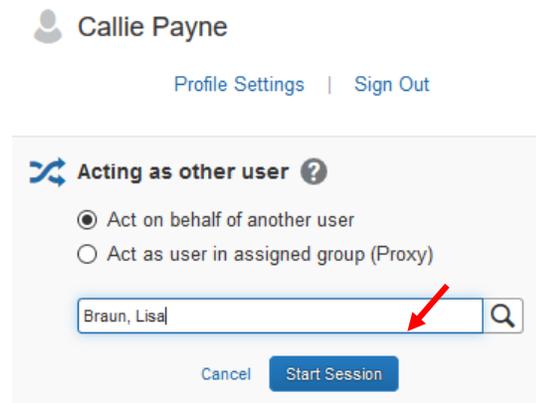
- e. **Can Approve** – Allows the delegate to approve Travel Requests and Expense Reports for the approver.
- f. **Can Approve Temporary** – Allows the delegate to approve Travel Requests and Expense Reports for a set date range.
- g. **Can Preview for Approver** – Allows the delegate to preview each Travel Request and Expense Report in the approver’s approval queue.
- h. **Receives Approval Emails** – Allows the delegate to receive new Travel Request and Expense Report pending your approval notifications and email reminders to the approver.

How to Approve as a Delegate

1. Click **Profile** in the top right-hand corner of the homepage. Type in the Name, email or NetID of the approver you are assigned as a delegate for in **Act on behalf of another user** search field.



2. Once you have selected the correct approver, click **Start Session**.



3. You will see the Acting as (NAME) in the top right-hand corner of the screen. You can now click **Required Approvals** to be taken to the approvers queue. Please refer to the [SAP Concur Expense: Approver's Guide](#) for how to approve.

