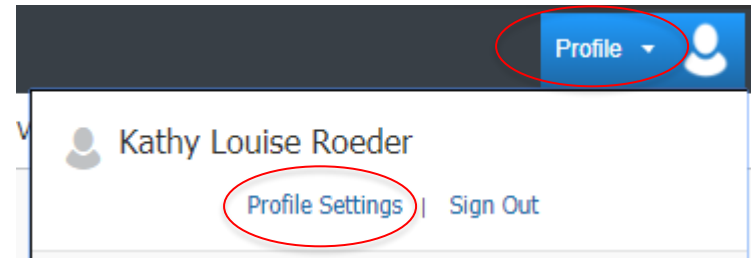


Getting Started In Concur

Adding and Removing Delegates & Travel Arrangers

How to Add a Delegate

- Sign into Concur at udel.edu/concur
- Click Profile
- Select Profile Settings



How to Add a Delegate cont'd...

- The Profile Settings page offers a few paths that each take you to the same Delegate selection menu.
- Select either Request Delegate or Expense Delegate

Profile Personal Information System Settings Concur Mobile Registration Concur Mobile Devices Travel Vacation Reassignment

Your Information
Personal Information
Company Information
Contact Information
Email Addresses
Emergency Contact
Credit Cards

Travel Settings
Travel Preferences
International Travel
Frequent-Traveler Programs
Assistants/Arrangers

Request Settings
Request Information
Request Delegates
Request Preferences
Request Approvers
Favorite Attendees

Expense Settings
Expense Delegates
Expense Preferences
Expense Approvers
Favorite Attendees

Profile Options

Select one of the following to customize your user profile.

Personal Information
Your home address and emergency contact information.

Company Information
Your company name and business address or your remote location address.

Credit Card Information
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

E-Receipt Activation
Enable e-receipts to automatically receive electronic receipts from participating vendors.

Travel Vacation Reassignment
Going to be out of the office? Configure your backup travel manager.

Request 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.

Concur Mobile Registration
Set up access to Concur on your mobile device.

System Settings
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information
How can we contact you about your travel arrangements?

Setup Travel Assistants
You can allow other people within your companies to book trips and enter expenses for you.

Travel Profile Options
Carrier, Hotel, Rental Car and other travel-related preferences.

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.



How to Add a Delegate cont'd...

- On the Delegates menu, click Add

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 Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
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How to Add a Delegate cont'd...

- Once you click Add, Concur will generate a search field
- You can start typing the name of any UD employee.
- As you type, names of employees will populate
- Make your selection

The screenshot shows the 'Expense Delegates' interface. At the top, there are tabs for 'Delegates' and 'Delegate For', and buttons for 'Add', 'Save', and 'Delete'. Below this, a text box contains the search criteria: 'Delegates are employees who are allowed to perform work on behalf of ot' and 'Search by employee name, email address, employee id or login id'. A search input field contains the text 'Pick, Kyle'. A dropdown menu is open, showing a list of employee suggestions. The first suggestion is 'Pick, Kyle' with email 'KYLEPICK@UDEL.EDU', User ID '702389898', and Logon ID '702389898@udel.edu'. The second suggestion is 'Pickering, Kristen' with email 'KPICK@UDEL.EDU', User ID '700456604', and Logon ID '700456604@udel.edu'. The third suggestion is 'Pickering, Stephanie' with email 'STEFFYP@UDEL.EDU', User ID '701542362', and Logon ID '701542362@udel.edu'. A red oval highlights the 'Pickering, Kristen' entry. To the right of the dropdown, there are checkboxes for 'Can V' and 'Recei', with the 'Recei' checkbox checked.



How to Add a Delegate cont'd...

- The employee you have selected as your delegate will appear
- You may have more than one delegate
- All of your delegates will be listed together with details of what tasks you are allowing them to complete on your behalf
- Select the permissions you want to grant and click Save

<input type="checkbox"/>	Name	Can Prepare	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Martin, Margot MARGOTM@UDEL.EDU	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Pickering, Kristen KPICK@UDEL.EDU	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>



Delegate Permissions

- Can Prepare
 - Allows your Delegate to prepare Expense Reports on your behalf. You will still be required to Submit the report.
- Can Submit Requests
 - Allows your Delegate to submit requests on your behalf.
- Can View Receipts
 - Allows your Delegate to view your receipts (required for Delegates preparing Expense Reports).
- Receives Emails
 - Allows Delegates to be copied on emails generated by Concur addressed to you.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Martin, Margot MARGOTM@UDEL.EDU	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Pickering, Kristen KPICK@UDEL.EDU	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>



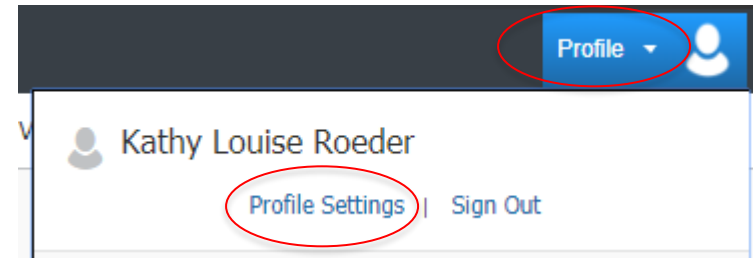
Delegate Permissions cont'd...

- Can Approve
 - If you are either a Supervisor or Cost Object Approver in Concur, this allows your Delegate to approve Requests and Expense Reports on your behalf. To be granted this permission, the Delegate must also be either a Supervisor or COA in Concur
- Can Approve Temporary
 - Grants Approval permission to your Delegate for a specific period of time
- Can Preview For Approver
 - Allows the Delegate to review Expense Reports pending your approval and Notify you when the review is complete and the report is ready for your approval.
- Receives Approval Emails
 - Allows Delegates to be copied on emails from Concur about Requests and Expense Reports pending your approval



How to Add a Travel Arranger or Assistant

- Sign into Concur at udel.edu/concur
- Click Profile
- Select Profile Settings



How to Add a Travel Arranger or Assistant cont'd...

- The Profile Settings page offers a couple of paths that each take you to the same Travel Assistant selection menu.
- Select either Assistants/Arrangers or Setup Travel Assistants

Profile Personal Information System Settings Concur Mobile Registration Concur Mobile Devices Travel Vacation Reassignment

Your Information
Personal Information
Company Information
Contact Information
Email Addresses
Emergency Contact
Credit Cards

Travel Settings
Travel Preferences
International Travel
Frequent-Traveler Programs
Assistants/Arrangers

Request Settings
Request Information
Request Delegates
Request Preferences
Request Approvers
Favorite Attendees

Expense Settings
Expense Information
Expense Delegates
Expense Preferences
Expense Approvers
Favorite Attendees

Profile Options

Select one of the following to customize your user profile.

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Your home address and emergency contact information.

Company Information
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Credit Card Information
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

E-Receipt Activation
Enable e-receipts to automatically receive electronic receipts from participating vendors.

Travel Vacation Reassignment
Going to be out of the office? Configure your backup travel manager.

Request 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.

Concur Mobile Registration
Set up access to Concur on your mobile device

System Settings
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information
How can we contact you about your travel arrangements?

Setup Travel Assistants
You can allow other people within your companies to book trips and enter expenses for you.

Travel Profile Options
Carrier, Hotel, Rental Car and other travel-related preferences.

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.



How to Add a Travel Arranger or Assistant cont'd...

- On the Assistants and Travel Arrangers menu, click Add an Assistant

Assistants and Travel Arrangers Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants ?

Your Assistants and Travel Arrangers + Add an Assistant

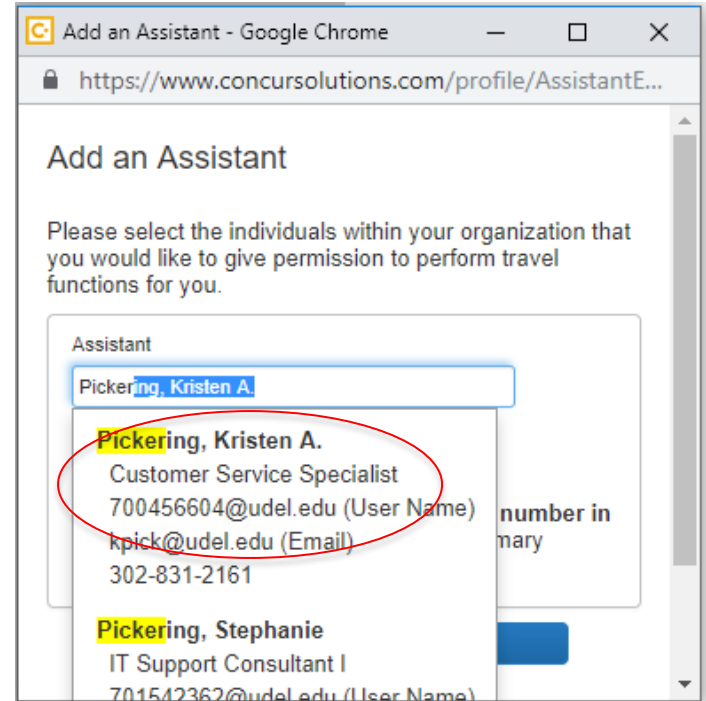
You currently have no assistants defined.

Save



How to Add a Travel Arranger or Assistant cont'd...

- Once you click Add an Assistant, Concur will generate a search field
- You can start typing the name of any UD employee.
- As you type, names of employees will populate
- Make your selection



How to Add a Travel Arranger or Assistant cont'd...

- Two permission options are available for selection
- “Can book travel for me” simply allows the Arranger access to book travel on your behalf
 - You may have many Travel Arrangers
- “Is my primary assistant for travel” allows the Assistant to make changes to your profile *as well as* book travel on your behalf
 - You may have only one Primary Travel Assistant
- Make your selection
- Click Save

Add an Assistant - Google Chrome

https://www.concursolutions.com/profile/AssistantE...

Add an Assistant

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Assistant

Pickering, Kristen A.

Can book travel for me

Is my primary assistant for travel*

*Individuals/Groups with no work phone number in their profile cannot be designated as primary assistant for travel.

Save Cancel



How to Add a Travel Arranger or Assistant cont'd...



- The employee you have selected as your Arranger/Assistant will appear
- All of your Arrangers/Assistant will be listed together, noting what permission you have assigned them

Assistants and Travel Arrangers Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants ?

Your Assistants and Travel Arrangers + Add an Assistant

Pickering, Kristen A. (Primary Travel Asst.)	Can book travel? <input checked="" type="checkbox"/>	 
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Questions?

- AskConcur@udel.edu
- udel.edu/procurement

