Manage Delegates

A delegate is a person authorized to act on the user's behalf. Request and Expense share delegates, so assigning a delegate to one assigns it to the other.

1. Select Request Delegates or Expense Delegates from Profile Settings

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.

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.

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.

2. The "Delegates" tab is users assigned as delegates to the account
3. Click "Add" then search for and select the desired delegate's name
4. Assign the applicable permissions and click "Save"

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 permissions for Expense and Request.

	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
☐	Test, Admin admin@alaska.edu	☑	☑	☑	☑	☑	☐	☑	☐	☐	☐	☐
☐	Test, COA1 Approver coa1@alaska.edu	☐	☐	☐	☐	☑	☐	☐	☑	☐	☐	☑
☐	Test, COA2 Approver coa2@alaska.edu	☐	☐	☐	☐	☑	☐	☐	☐	☑ 07/21/2020 07/24/2020	☐	☐
☐	Test, Default Approver approver@alaska.edu	☐	☐	☐	☐	☐	☐	☐	☐	☐	☑	☐

The following permissions are for travel coordination:

1. Can Prepare – The delegate may prepare Requests and Reports on the user's behalf. The user is still required to submit the Report.
2. Can Book Travel – The delegate may arrange Travel on the user's behalf. Delegates receive the same booking email notifications regardless of who completes the booking.
3. Can Submit Reports – Delegates cannot submit a Report on behalf of a user except for "Non-UA Affiliate/Volunteer." However, the "Can Submit Reports" permission allows the delegate to click "Submit Report" to view and resolve any audit flags before the user submits.
4. Can Submit Requests – Delegates cannot submit and approve the same Request.
5. Can View Receipts [and available expenses] – Should check by default when Can Prepare is selected.
6. Receives Emails – The delegate receives system emails sent to the user depending on the user's and delegate's email notification settings. Delegates with this permission may find that it generates a lot of extra emails, especially if they are a delegate for several users. Creating an email filter to manage these is recommended. (See Concur: Email Notifications)

The following permissions are for proxy approvers:

1. Can Approve [indefinitely on the user's behalf] – The delegate can approve travel Requests and Reports on the user's behalf (no time limit). Before giving an individual this type of delegate access please ensure they have the authority to approve travel on behalf of the user.
2. Can Approve Temporary (a date range is required) – The delegate can approve travel Requests and Reports on the user's behalf for a set date range.
3. Can Preview for Approver – The delegate can preview but not approve the Request/Report before the approver. The delegate's task is to ensure that the Request/Report is ready for the approver to review and approve. With this option, the approver can wait until the preview delegate has selected Notify Approver (which generates an email notification to the approver), or they can approve the Request/Report without the delegate's review.
4. Receives Approval Emails – The delegate is copied on approval notification emails.

The second tab, "Delegate For," is individuals for whom the user is a delegate. Users cannot change the permissions they have as a delegate. However, they can remove themselves entirely by selecting the check box by their name and clicking the blue "Delete" button.

Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
Test, COA1 Approver coa1@alaska.edu	☐	☐	☐	☐	☑	☐	☐	☑	☐	☐	☐