

Concur Tips and Tricks


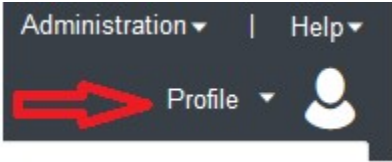

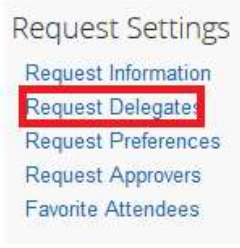
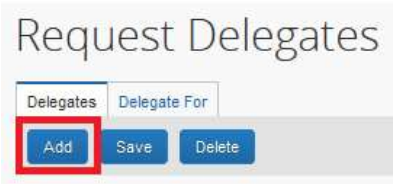
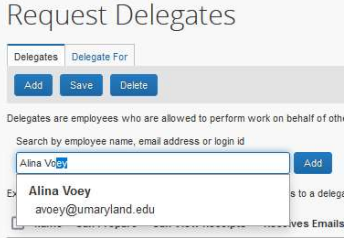
Setting up a delegate

There are two types of delegates in Concur.

Traveler Delegate – this person creates Travel Requests and Expense Reimbursements on behalf of any traveler.

Approver Delegate – this person approves Travel Requests or Expense Reports on behalf of any approver.

To setup a delegate you can follow these steps

<p style="text-align: center;">Step 1 – Log into Concur</p> <p>From your myUMB portal page click the Concur Travel & Expense icon</p> 	<p style="text-align: center;">Step 2 – Open your Profile</p> <p>Select the Profile icon in the top right hand corner of Concur.</p> 																																				
<p style="text-align: center;">Step 3 – Select Profile Settings</p> <p>Select the Profile Settings link</p> 	<p style="text-align: center;">Step 4 – Select Request Delegate</p> <p>Select the Request Delegates link</p> 																																				
<p style="text-align: center;">Step 5 – Select Add</p> <p>Select the Add button.</p> 	<p style="text-align: center;">Step 6 - Search</p> <p>Search for the person who you want to setup as a delegate and select Add.</p> 																																				
<p style="text-align: center;">Step 7a – Setup Traveler Delegate</p> <p>To setup a Traveler Delegate select “Can Prepare”, “Can View Receipts”, and “Receives Email”</p> <table border="1" data-bbox="217 1885 760 1948"> <thead> <tr> <th><input type="checkbox"/></th> <th>Name</th> <th>Can Prepare</th> <th>Can View Receipts</th> <th>Receives Emails</th> <th>Can Approve</th> <th>Can Approve Temporary</th> <th>Can Preview For Approver</th> <th>Receives Approval Emails</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Voey, Alina avoey@umaryland.edu</td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails	<input type="checkbox"/>	Voey, Alina avoey@umaryland.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p style="text-align: center;">Step 7b – Setup Approver Delegate</p> <p>To setup an Approver Delegate select “Can Approve”, “Can View Receipts”, and “Receives Approval Email”</p> <table border="1" data-bbox="841 1885 1383 1948"> <thead> <tr> <th><input type="checkbox"/></th> <th>Name</th> <th>Can Prepare</th> <th>Can View Receipts</th> <th>Receives Emails</th> <th>Can Approve</th> <th>Can Approve Temporary</th> <th>Can Preview For Approver</th> <th>Receives Approval Emails</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Voey, Alina avoey@umaryland.edu</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table>	<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails	<input type="checkbox"/>	Voey, Alina avoey@umaryland.edu	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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