How to add a delegate and act as a delegate

A delegate can be added to Concur to help you with travel arrangements. Delegates can also create requests and setup expense reports; delegates cannot submit final expense reports. Supervisors in PHR and fiscal officers in the Financial System can assign delegates to approve on their behalf only if the delegate is a supervisor or financial officer themselves.

Screenshots are provided to use as visual guides for certain steps.

How to add a delegate in Concur

1. Click Profile at the top-right, and then click Profile Settings.

2. Click on Request Delegates or Expense Delegates on the left hand side. For UMD, these 2 options are the same thing so you can click on either one.

   • Regardless of which Delegate type is chosen, the delegate will be able to create both requests and expense reports.

3. Click Add. A search bar will appear.
   a. You can search for the person you want to assign as a delegate.
   b. Click Add next to the search bar to add the delegate.

4. Select the action options you want available for your delegate.
   a. When you are finished, click Save.
How to act as someone’s delegate in Concur

Acting as a delegate is a temporary status in Concur. You must enable it each time you act for someone else.

1. Click on Profile at the top-right.

2. Make sure Act on behalf of another user is selected. If someone has added you as their delegate, search for them in the search bar.
   a. Click on their name.
   b. Click Start Session.

3. You are now acting as a delegate for another employee. If you are creating an expense report as a delegate, you are not able to submit the report once it is completed. The traveling employee you are acting on behalf of must Submit the FINAL expense report.
   • Nevertheless, as a way to check your entries UMD recommends you, as a delegate, click Submit for an expense report. Doing this will allow Concur to alert you of issues to be corrected. Your action as a delegate will not submit the report.