

Setting Up Concur Delegates

Context:

Within Concur there are two different levels of approval that each trip goes through:

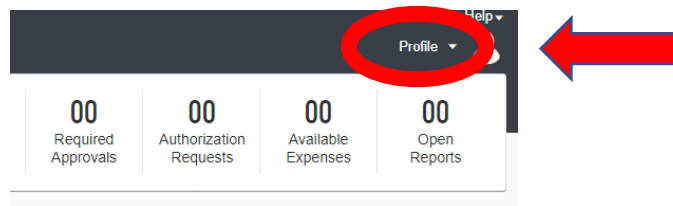
- **Fund Account Head (GFA / PI):** This is the faculty member who is in charge of the account that will be paying for the trip. Their level of approval is called “Budget Approval”.
 - No delegate can be designated for this. The person in charge of the money ALWAYS has to approve expenses that hit their account.

- **HR Lead (known in Concur):** This is the department member who you work for according to your U of U Human Resource file. Their level of approval is called “Request/Expense Approval”.
 - For most in the department, this will be the Department Chair. However, for some it will be the faculty member they are working for for their income, not for school credit / research.
 - If your HR Lead is NOT the department head, there is a good chance your Fund Account Head is the same as your HR Lead. But sometimes your HR Lead is not involved directly with why you went on the trip that you are needed to be reimbursed for and thus they are out of the loop as to if they should approve your travel expenses.
 - Thus, we ask that HR Leads designate the Department Accountant as their delegate.
 - FYI: The Department Chair has designative the Accountant as their delegate.

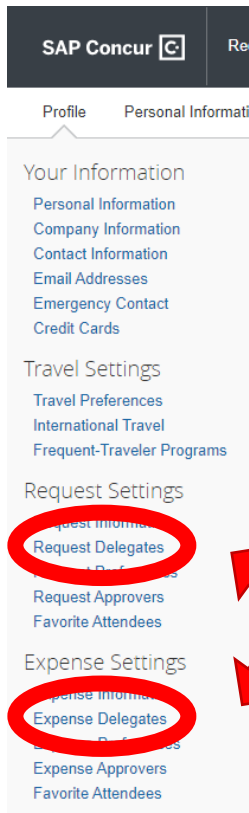
Instructions:

To make sure your account is set up correctly so that your requests are approved in a timely and correct fashion, we ask that you please follow the below instructions.

1. Log into Concur. [UTravel Home | Financial Services \(utah.edu\)](https://utah.edu/UTravelHome)
2. Go to your Profile (found in the upper righthand corner) and click on "Profile Settings".



3. Click on "Request Delegates" OR "Expense Delegates" (as they are the same thing) (found on the left side).



4. Then make sure you have all 4 department delegates listed and with the correct permissions (as shown below). AND then click “Save”.

- You, of course, can decide to not include all 4 department delegates or to not give certain permissions. If you choose to do so, please know that the department team will be limited in how we can help you and you may experience delays in getting your travel reimbursements.

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.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	KIRKPATRICK, KAYLEIGH U1148394@utah.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	LEFLER, JAMEE U0116309@utah.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	RIGBY, ALAN U0110345@utah.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	FUTRAL, SHANNA U0549157@utah.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>