

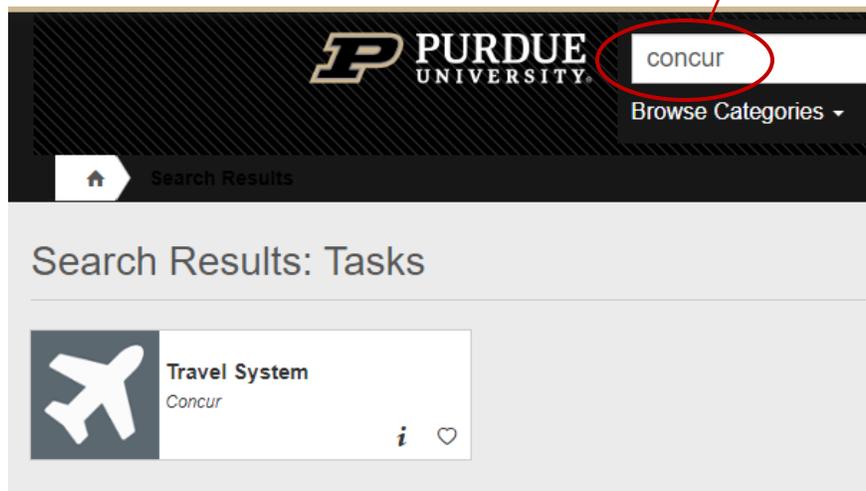
Standard Operating Procedures: Requesting a delegate via Concur Travel System

Purpose : Adding a delegate to a Concur account allows the specified delegate permissions to prepare, submit reports and requests, view receipts, and receive any emails pertinent to such. Users have the option to modify or revoke delegate permissions at any time.

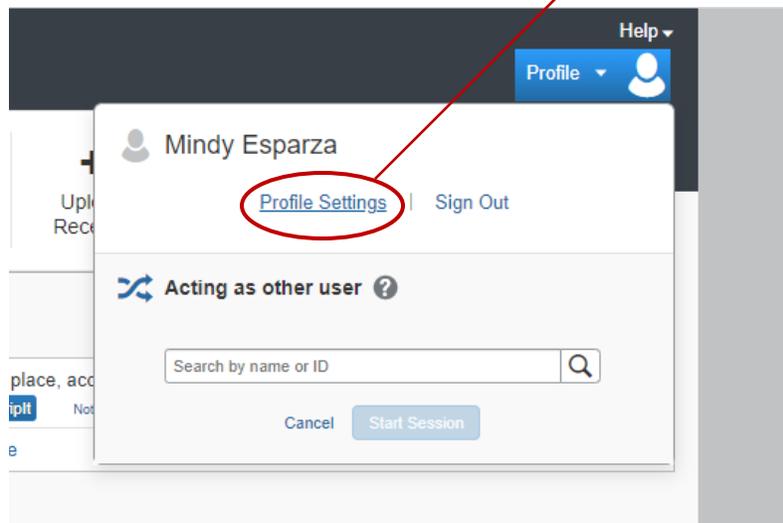
References: one.purdue.edu , Concur Travel System

1. Concur may be accessed by visiting one.Purdue.edu. If the icon does not appear in the list of tiles on the home screen, the user may find it by typing “Concur” in the search bar at the top of the page. Please note that a BoilerKey is required to access Concur.

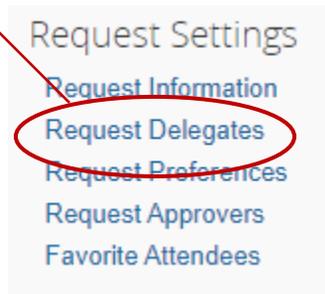
*If you need assistance retrieving your BoilerKey, please contact IT at helpdesk@pfw.edu or by calling (260)481-6030.



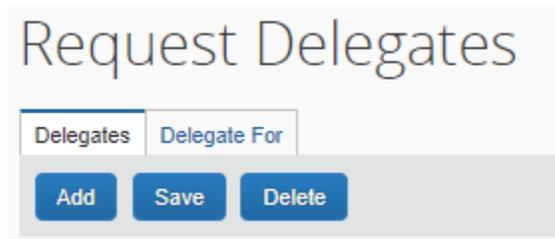
2. Upon successfully logging into Concur, the user will arrive at a home screen. In the upper right hand corner of the screen, the user will find an icon with a pulldown that says “Profile”. The user should click the pulldown and select the link that reads “Profile Settings”.



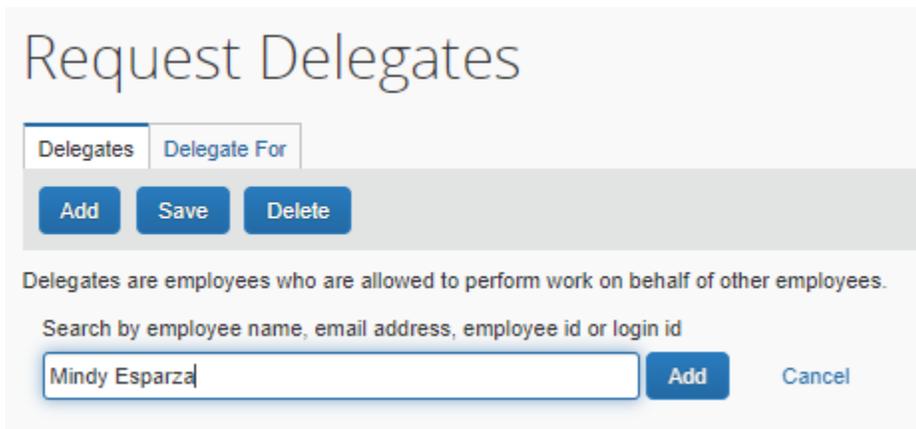
3. On the left hand side of the screen the user will find a vertical banner. The user should select the link that reads "Request Delegates".



4. From this screen, the user should select the "add" button.



5. Type the name, email address, employee or login id of the requested delegate in the box and click "add". Select the correct user from the suggested names that appear below.

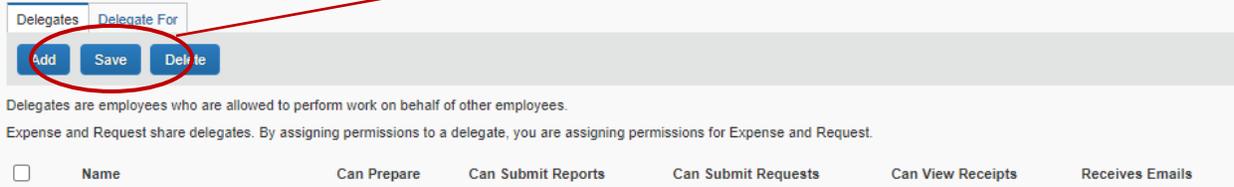


6. Ensure that the appropriate permissions are selected.
***For assistance with submitting mileage reimbursements, please select ALL of the boxes.**

Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails
<input type="checkbox"/>				
<input checked="" type="checkbox"/>				

7. The user should double check to ensure that the correct delegate information appears and that the appropriate permissions have been selected before **clicking the “Save” button** at the top.

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 Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails
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8. The user should notify the new delegate via email that they have been added and request confirmation.