

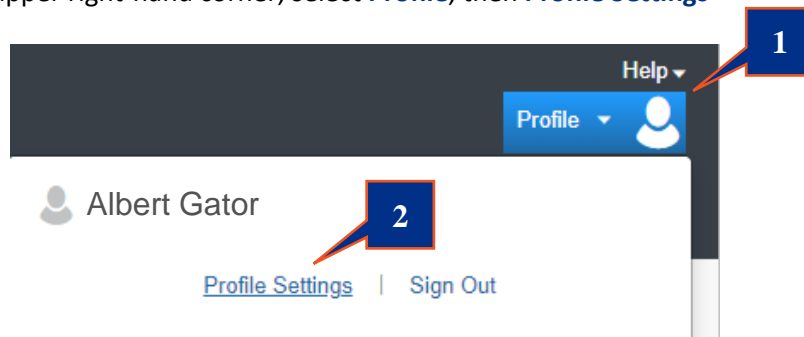
Editing Delegates in Concur

A delegate is a user who is granted permission to act on behalf of another user to perform tasks, such as filling out a Travel Request or preparing an Expense Report. You can add or delete delegates in your profile. A delegate **cannot add themselves** to your profile.

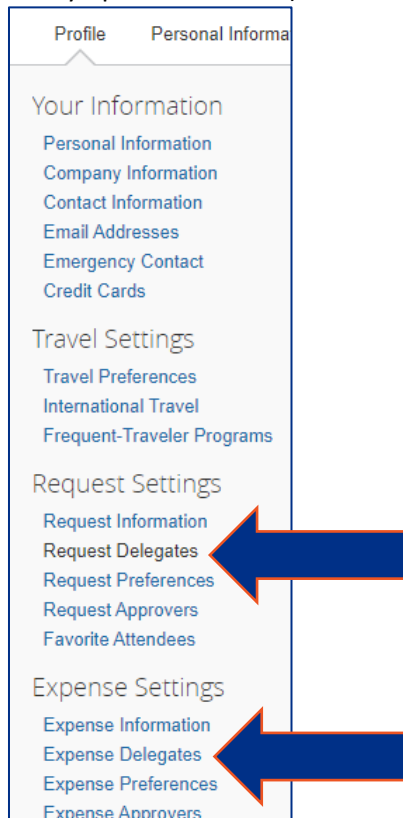
Navigation

To access Delegates (add or delete), follow these steps in UF GO:

1. Log into Concur, one of three ways:
 - a. **Direct:** Log in to <https://www.concursolutions.com/> with your Gatorlink email
 - b. **ONE.UF:** Log in to <https://one.ufl.edu> > Select UF GO under the Faculty/Staff section
 - c. **PeopleSoft:** Main Menu > My Self Service > UF GO Travel and PCard
2. In the upper right-hand corner, select **Profile**, then **Profile Settings**

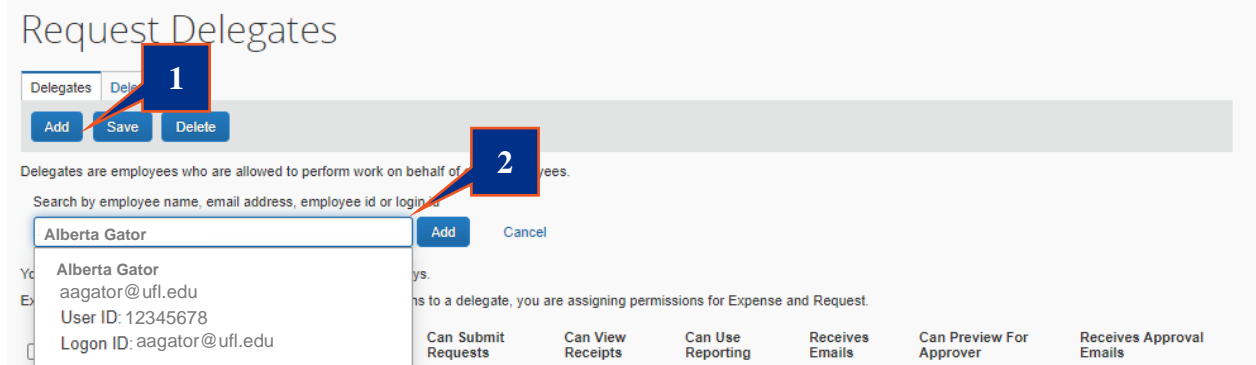


3. Select either **Request Delegates** or **Expense Delegates** from the menu on the left (updates made to one list will automatically update the other).



How to add a Delegate

1. Click **Add** to enter your desired Delegate's name. Select the correct delegate



Request Delegates

Delegates Delegate For

Add **Save** **Delete**

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

Alberta Gator **Add** **Cancel**

Alberta Gator
 aagator@ufl.edu
 User ID: 12345678
 Logon ID: aagator@ufl.edu

Can Submit Requests Can View Receipts Can Use Reporting Receives Emails Can Preview For Approver Receives Approval Emails

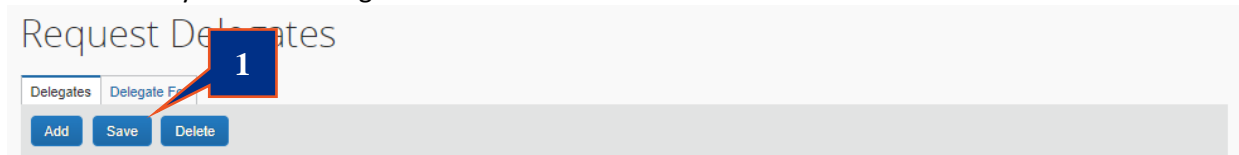
2. It is recommended to select all but the last two options ('Can Preview For Approver' and 'Receives Approval Emails') to limit the volume of emails, but these can be selected if the preference exists between the User and their delegate

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Alberta Gator aagator@ufl.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="checkbox"/>

- a. Here are definitions for some of those boxes:

- ✓ **Can Prepare:** Delegate may prepare Requests and Reports on your behalf
- ✓ **Can View Receipts:** This box auto-checks if "Can Prepare" is selected. Allows Delegate to view your receipts in UF GO (e-receipts, receipts images, etc.)
- ✓ **Receives Emails:** Copies your Delegate on all emails generated by UF GO and addressed to you.

3. Click **Save** your save changes



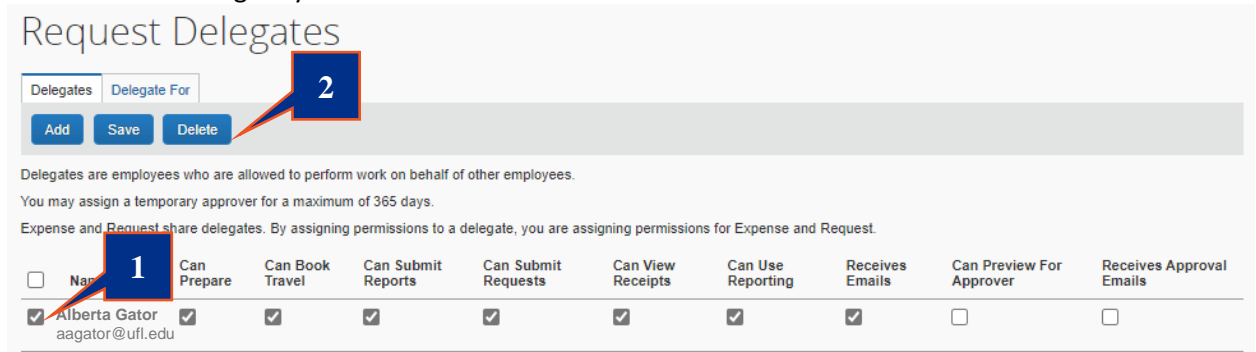
Request Delegates

Delegates Delegate For

Add **Save** **Delete**

How to delete a Delegate

1. Select the Delegate you wish to delete and click **Delete**



Request Delegates

Delegates Delegate For

Add **Save** **Delete**

Delegates are employees who are allowed to perform work on behalf of other employees.

You may assign a temporary approver for a maximum of 365 days.

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	Can Use Reporting	Receives Emails	Can Preview For Approver	Receives Approval Emails
<input checked="" type="checkbox"/>	Alberta Gator aagator@ufl.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="checkbox"/>

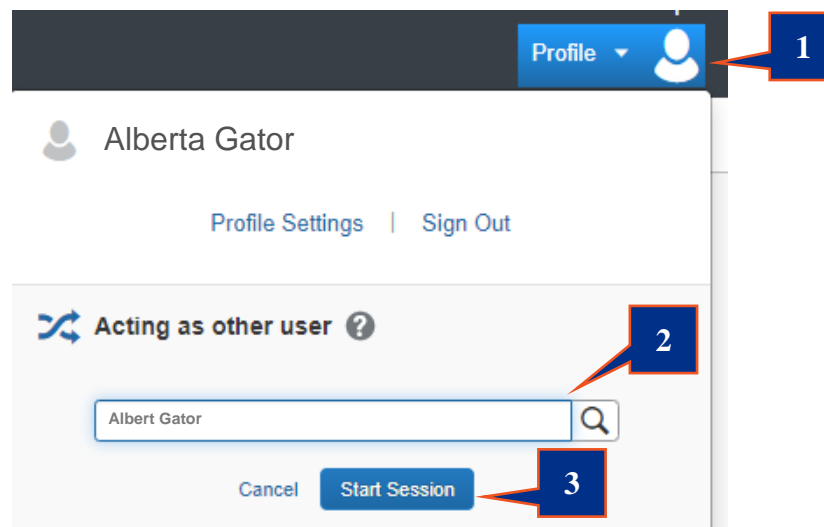
Acting as a Delegate in Concur

Once selected as someone’s delegate, you can act on behalf of the other user. You will be able to complete Travel Requests and Expense Reports, but keep in mind that you cannot submit Expense Reports. The traveler will need to review it and submit it.

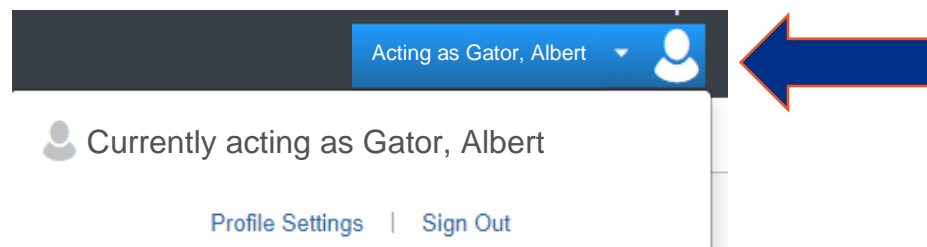
Operate as a Delegate

To access Delegate functionality, follow these steps in UF GO:

1. In the upper right-hand corner of the dashboard, click the **Profile** drop-down button.
2. **Search** for the person on whose behalf you want to act on their behalf, by entering their last name and selecting the appropriate user from the list. If the desired user does not appear, they will need to add you as a delegate.
3. Select **Start Session**. You are now acting as a delegate for the selected user. Proceed as you would when acting as yourself (preparing reports, submitting requests, etc.)



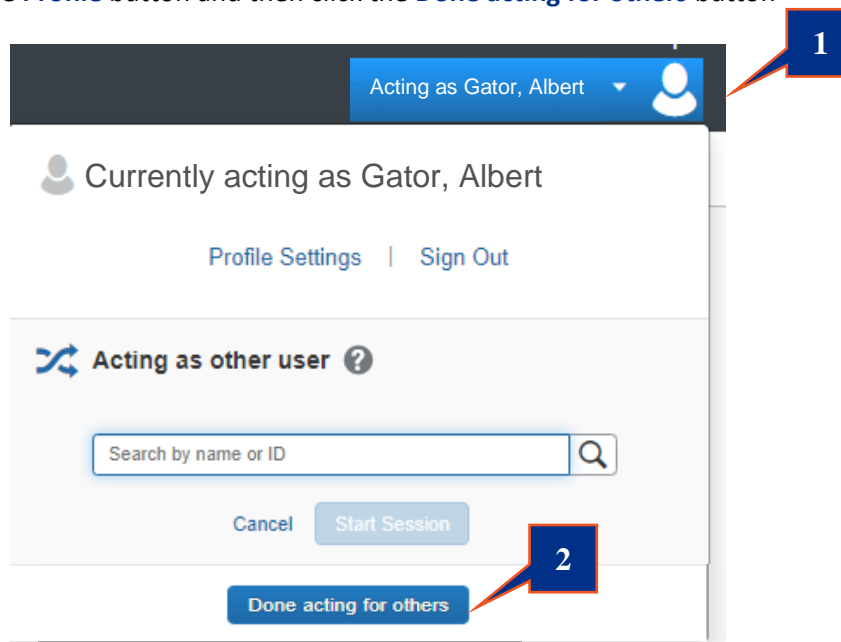
4. If “Acting as” replaces “Profile” in the upper right-hand corner, this confirms you are successfully operating as a Delegate



To End Delegate Session

This will terminate the delegate session and all activity afterwards will be to the user's profile. To end the delegate session:

1. Click the **Profile** button and then click the **Done acting for others** button



Should you have any questions in the meantime about UF GO, please feel free to reach out to Patrick Sell: Patrick.sell@ufl.edu and J.A. Lopez: lopezja@ufl.edu.