

Concur Approval Delegation Request

The primary function of these guidelines is to outline the requirements and steps to allow for approval delegation within Concur to allow additional individuals to approve on that individual's behalf while maintaining institutional control over the process.

Concur only allows for documents to be routed for approval to one person. If the funding approver is out of the office, documents cannot be approved until they return. Additionally, documents can be delayed at the supervisor approval level if the supervisor experiences an extended absence. To prevent delays in approvals, the Division of Business Affairs and Knowledge Services developed the following requirements to add additional approval delegates.

This process will be utilized to delegate Level V Funding Approval to another already established Level V approver. In special circumstances, reports to supervisor approval can be delegated temporarily due to extenuating circumstances.

Please note this process is only for delegating approvals. [Concur users can delegate document creation access on their own profile.](#)

Requirements:

- All approvers and delegates must have completed the mandatory Concur training in Canvas.
- For a delegate to be assigned, a [request form](#) must be completed by the approver requesting delegation.
- All delegate approvers must have Level V Security Access in UTShare.
- A delegate approver cannot be a delegate processor for the same person since document creators cannot approve financial or HR transactions.
- A reports-to manager who is going on an extended leave can request delegation up their supervisory chain (EX: Dean can delegate to Provost, Manager can delegate to Director, etc.).
 - This delegation should be temporary and submitted with an end date.
- An approver's supervisor can request delegation access to their direct reports.
 - Delegation for supervisor approvals will only be granted for a limited time in situations such as FMLA, leave of absence, or extended vacation.
- Approvers will designate that a delegate is permanent, or, if temporary, they will enter an end date for the delegation on the form.
 - Once processed, the delegate will be able to act as the approver and switch to the approver's profile to approve on their behalf.
- Self-service delegate approval is not available to users. OIT Knowledge Services will administer the delegate assignment process with the Delegate Request Form.
- All funding sources within Concur must have at least two individuals listed to prevent errors when the subject of the document is the approver. These individuals are assigned based on UTShare's Level V Department Financial Approvers.