

## Additional Delegate Request

The primary function of these guidelines is to outline the requirements and steps to allow for delegate approvals within Concur to allow for 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 per funding source. In order to prevent delays in approvals, the Division of Business Affairs and Knowledge Services developed the following requirements to add an additional delegate.

### Requirements:

- For a delegate to be assigned, a request form (<https://forms.office.com/r/Sxm5SSR2NH>) must be completed by the approver requesting delegation.
  - Approvers will designate that a delegate is permanent or 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 into 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.
- True exceptions based on medical leave or emergencies can be reviewed on a case-by-case basis.
- All funding sources within Concur must have at least two individuals listed. This will prevent errors when the subject of the document is the approver.
- All approvers and delegates must have completed the mandatory training course to ensure they understand the process and have access to Concur.
- An approver's supervisor can request delegation access to their direct reports.
- A reports-to manager can request delegation up their supervisory chain (EX: Dean can delegate to Provost, Manager can delegate to Director, etc.).
- 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.