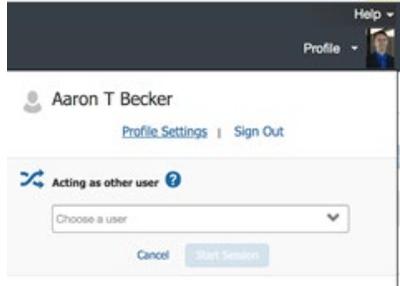


# Adding a Delegate in Concur

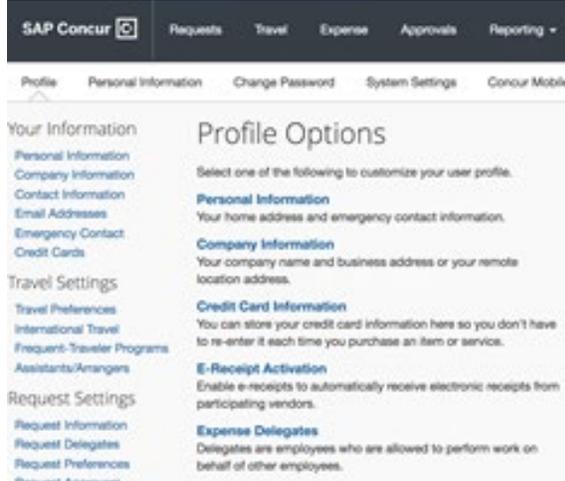
Please review & update your **delegates and assistants** in Concur asap so we may better assist you with all of your travel needs. If you have not done so already, please **add Jenna Greengold, Nigh Bui, & Kellie Sager** as a delegate and assistant in your Concur profile with the instructions below.

Go to: <https://www.concursolutions.com/nui/signin> or log in through **Access UH**.

1. Click sign in (if not through AccessUH)
2. (at right) Click on Profile->**Profile Settings**



3. Choose **Expense Delegates** link in Profile Options:



4. Delegates, click on “Add”



5. Type in last names for “**Kellie Sager**” “**Jenna Greengold**” & “**Nghi Bui**”
6. Please remove “**Loretta Herbeck**” “**Elizabeth Giron**” & “**Linh Phan**” if they are on your list. Check their name & click “**Delete**”.

## Expense Delegates

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 View Receipts	Can Use Reporting	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Bui, Dong-Nghi dtbui3@uh.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Greengold, Jenna jbgreengold@uh.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

7. Check the boxes.
8. Click **"Save"**. This will update BOTH your expense and request delegates simultaneously!

## Approvers

Please verify that Badrinath Roysam is listed as your Approver in Concur. This can be found in your **profile** under **"Request/Expense Approvers"**. If it is blank type \* in the box and select the appropriate name.

Before submitting your travel requests, please look under the **"Approval Flow"** tab to ensure **Badrinath Roysam** is the **level 1 approver & Stacie Spikes is the level 2 or final approver**. Search for approvers by pressing \* in the box. Contact ECE front desk if there are any issues.

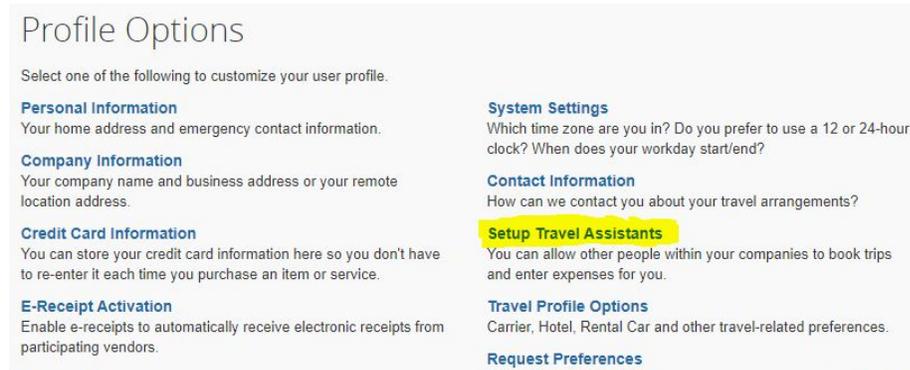
The screenshot shows the SAP Concur interface. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Approvals', and 'App Center'. The left sidebar lists various settings, with 'Request Approvers' highlighted. The main content area is titled 'Request Approvers' and shows a 'Default approver for your Requests' field with the value 'dtbui3@uh.edu - Stacie Spikes'. Below this, the 'Approval Flow' tab is active, showing a list of approvers:

- Unit Head Level 1: Roysam, Badrinath (11/05/2021 Approved)
- Certifying Signatory Level 2: Spikes, Stacie T. (11/08/2021 Approved)

# Adding an Assistant in Concur

A travel assistant is someone who can book your travel for you.

1. Under your profile settings click **“Setup Travel Assistant”**.

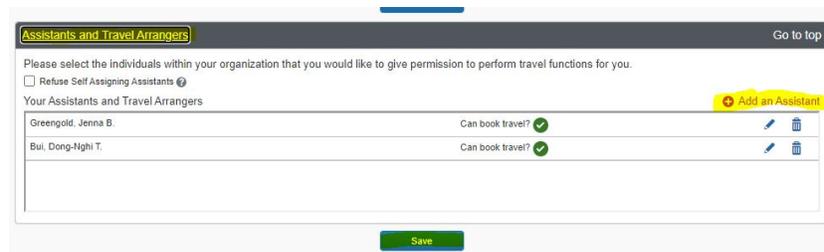


Profile Options

Select one of the following to customize your user profile.

- Personal Information**  
Your home address and emergency contact information.
- Company Information**  
Your company name and business address or your remote location address.
- Credit Card Information**  
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.
- E-Receipt Activation**  
Enable e-receipts to automatically receive electronic receipts from participating vendors.
- System Settings**  
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?
- Contact Information**  
How can we contact you about your travel arrangements?
- Setup Travel Assistants**  
You can allow other people within your companies to book trips and enter expenses for you.
- Travel Profile Options**  
Carrier, Hotel, Rental Car and other travel-related preferences.
- Request Preferences**

2. Click on **“Add an Assistant”**.



Assistants and Travel Arrangers

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

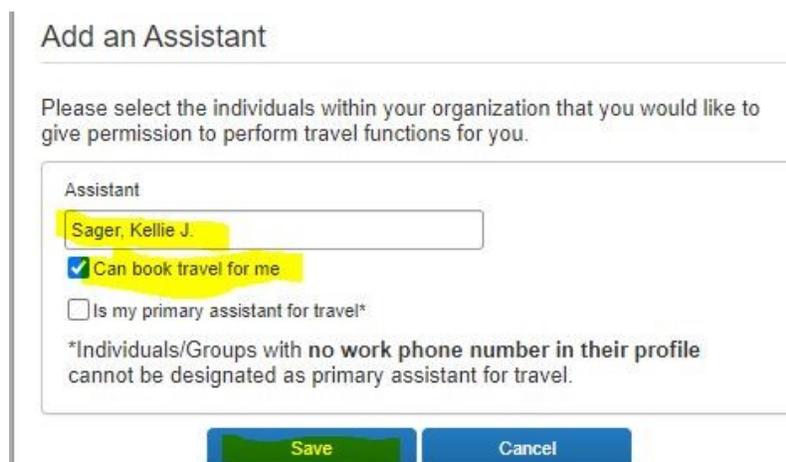
Refuse Self Assigning Assistants

Your Assistants and Travel Arrangers

Name	Can book travel?	Actions
Greengold, Jenna B.	<input checked="" type="checkbox"/>	<a href="#">Edit</a> <a href="#">Delete</a>
Bui, Dong-High T.	<input checked="" type="checkbox"/>	<a href="#">Edit</a> <a href="#">Delete</a>
<a href="#">Add an Assistant</a>		

[Save](#)

3. Enter the person's name and check **“Can book travel for me”** & **“Save”**.



Add an Assistant

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Assistant

Can book travel for me

Is my primary assistant for travel\*

\*Individuals/Groups with no work phone number in their profile cannot be designated as primary assistant for travel.

[Save](#) [Cancel](#)

4. Select **“Save”** again under **Assistants & Travel Arrangers**.
5. **Done!**