Redirect Approval during Vacation

Situation: Approver will be unavailable to approve reports for a period of time

**Step One: Select a Delegate to Approve on your behalf**

Note: The person you have selected as your Delegate must be an existing approver in Concur.

- In Concur, click on the Profile drop-down at the top right and select **Profile Settings**.
- On the left hand margin, select **Expense Delegates**.
- Add a delegate and check the box to permit them to approve expense reports on your behalf.
- You must click either **Can Approve** or **Can Approve Temporary** in addition to **Receives Approval Emails** for the designated person to receive the emails. If you only click the approve box, they will not receive the emails.
• If you select “Can Approve Temporary”, the end date only applies to the delegate’s ability to approve reports. The approver delegate will continue to receive approval emails after the end date. In order to turn off approval emails, the person who assigned the delegate needs to uncheck the “Receives Approval Emails” box upon returning to the office.

Note: More detailed instructions with screenshots are available in the document “Assign an Approval Delegate”

**Step Two: Notify Delegate**

• Contact the person you have assigned as a delegate
• Tell them that you have assigned them in Concur as an approver for any reports that come into your approval queue while you are away
• Give them the instructions below

**Approve expense reports as a delegate for another approver**

• Log into Concur the typical way – using your own PennKey
• Click on the Profile drop-down at the top right, then click on the “Act on behalf of another user...” drop-down menu. Select the name of the individual for whom you are performing approval duties in the absence.
• Click Start Session.

• **NOTE**: If you are a delegate for more than ten people, you will have to type the first few letters of the individual’s name to search for them in the drop-down.
• When the screen refreshes, the Profile drop-down will change to “Acting as” followed by the individual’s name and the single person icon will change to two people highlighted in green.

• You are now ready to approve any reports in their Approval list, just as you would normally.
• When you have finished with the approvals, return to the top of the screen to the “Acting as...” drop-down, and click “Done acting for others”. Once the screen refreshes you will be back in your own Concur account.

IMPORTANT: Any report that comes for approval during your absence will not be re-routed. It stays in your approval queue, and the delegate must administer for you to proceed with the approval.