

**This step-by-step guide will show you:**

- How to Delegate your approvals

1

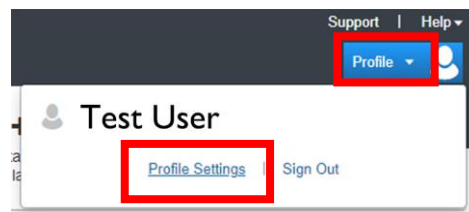
**DELEGATION**

When you go on holiday or are away from the business you can set the system so that another approver can authorise expenses on your behalf.

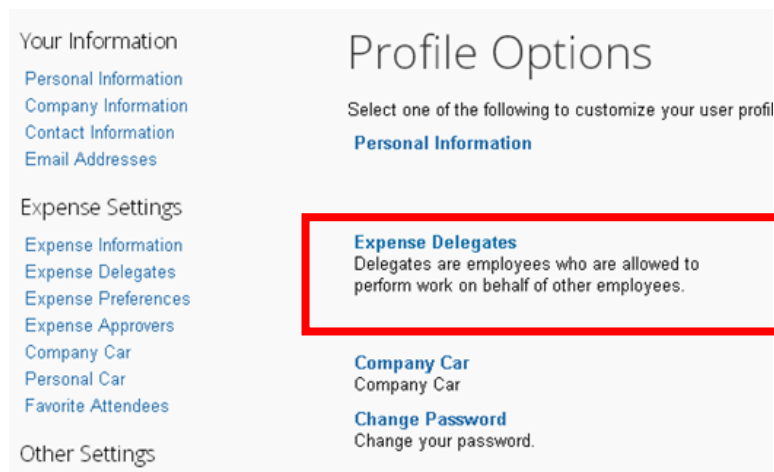
- a) Agree with an alternative authoriser to cover your authorisations while you are away

From the 'Home page':

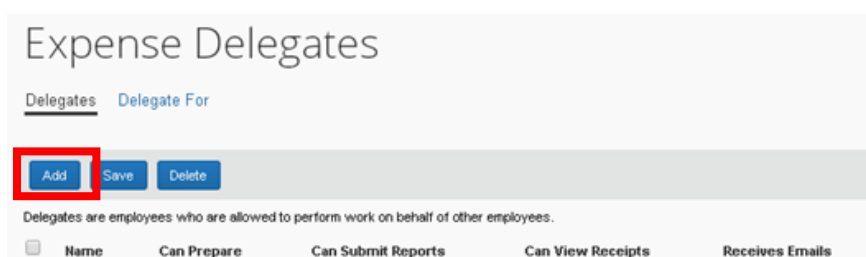
- b) Click on Profile  
c) Click Profile settings



- d) Click 'Expense Delegates'



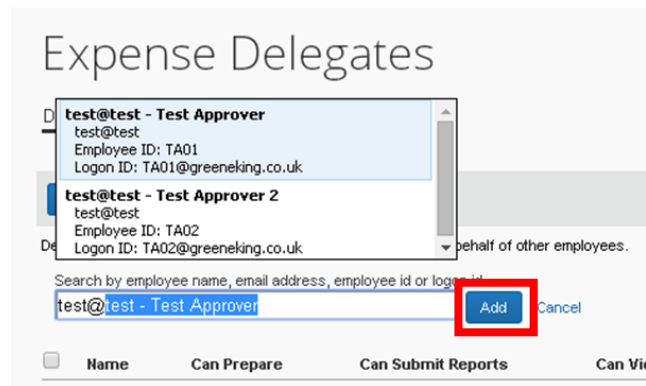
- e) Click on 'Add'



1

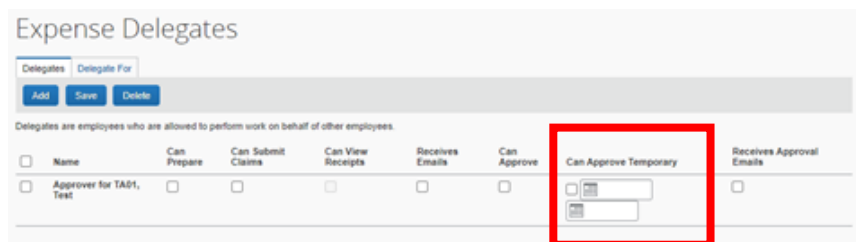
## DELEGATION (ONT.

- f) Enter the name of the person you would like to delegate approvals to and click on 'Add' (only approvers set up on the system can be delegated to)



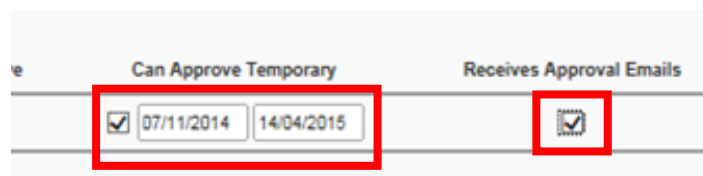
The screenshot shows the 'Expense Delegates' search interface. A search bar contains the text 'test@test - Test Approver'. Below the search bar, a list of results is displayed, including 'test@test - Test Approver' and 'test@test - Test Approver 2'. The 'Add' button is highlighted with a red box.

- g) Click on 'Can Approve Temporary'



The screenshot shows the 'Expense Delegates' table. The 'Can Approve Temporary' column is highlighted with a red box. The table has columns: Name, Can Prepare, Can Submit Claims, Can View Receipts, Receives Emails, Can Approve, Can Approve Temporary, and Receives Approval Emails.

- h) Enter the dates you would like the approver to cover for you



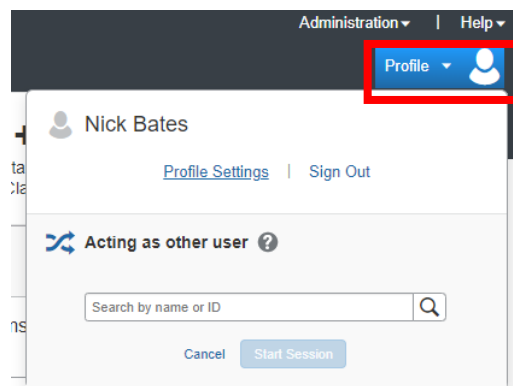
The screenshot shows the 'Can Approve Temporary' section. The date range '07/11/2014' to '14/04/2015' is entered and highlighted with a red box. The 'Receives Approval Emails' checkbox is also checked and highlighted with a red box.

- i) If you would like the person covering to be notified when an approval is required please tick 'Receives Approval Emails'
- j) Click on 'Save'

2

## COVERING


- a) When another approver asks you to cover their expense approvals, from the 'Home page':
- b) Click on Profile



The screenshot shows the user profile dropdown menu. The 'Profile' button is highlighted with a red box. The menu includes options for 'Nick Bates', 'Profile Settings', 'Sign Out', and 'Acting as other user'.


## COVERING (ONT.

- c) In the 'Acting as other user' enter the approver you are covering's name from the pick list (if the approver does not appear then the delegation has not yet been set up)
- d) Click on apply, the system will then switch to the other users profile so that you can approve claims

 **Test Approver 2**

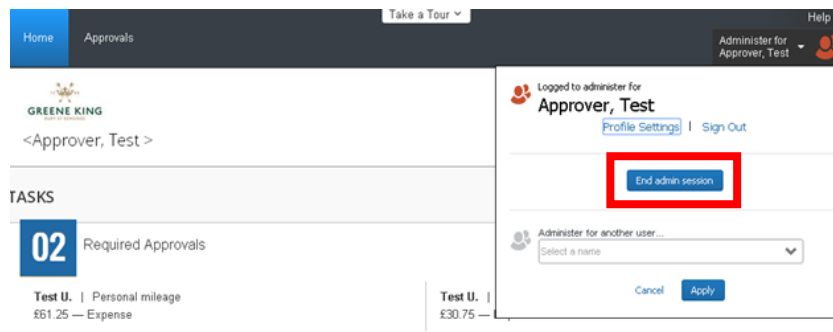
[Profile Settings](#) | [Sign Out](#)

---

 Administer for another user...

[Cancel](#) [Apply](#)

- e) To end your session as the other approver click on 'End admin session'



The screenshot shows the system interface with the following elements:

- Header:** Home, Approvals, Take a Tour, Help.
- Top Right:** Administer for Approver, Test.
- Left Panel:**
  - GREENE KING logo.
  - <Approver, Test>
  - TASKS
  - 02** Required Approvals
  - Test U. | Personal mileage £61.25 — Expense
- Main Content Area:**
  - Logged to administer for Approver, Test
  - [Profile Settings](#) | [Sign Out](#)
  - End admin session** (highlighted with a red box)
  - Administer for another user... (Select a name)
  - [Cancel](#) [Apply](#)
- Bottom Right:** Test U. | £30.75 —



For training issues and support with the system please contact Concur Support...



#### PHONE NUMBERS

01284 843300



#### EMAIL ADDRESSES

[Concur@greeneking.co.uk](mailto:Concur@greeneking.co.uk)

The Concur Support team do not set the expense policy, please treat them with respect and show 'We Care'.

Line Managers are unable to override limits that are set out in the policy. Any feedback on policy points should be directed to your Line Manager who can pick this up with HR.