

# **Concur Invoice: Delegate Configuration Setup Guide**

**Last Revised: April 13, 2019**

Applies to these SAP Concur solutions:

- Concur Expense
  - Professional/Premium edition
  - Standard edition
  
- Concur Travel
  - Professional/Premium edition
  - Standard edition
  
- Concur Invoice
  - Professional/Premium edition
  - Standard edition
  
- Concur Request
  - Professional/Premium edition
  - Standard edition



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# Revision History

Date	Notes/Comments/Changes
September 21, 2022	Minor edits; cover date not updated
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
February 17, 2021	Updated the copyright year; no other changes; cover date not updated
April 17, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 6, 2020	Updated the copyright; no other changes; cover date not updated
April 13, 2019	Changed the term "payment request" to "invoice" as part of the new user experience for Concur Invoice.
February 9, 2019	Changed the term "Concur" to "SAP Concur" where applicable and updated images to reflect the SAP Concur logo; no other content changes.
January 29, 2019	Updated the copyright; no other changes; cover date not updated
April 6, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
January 10 2018	Updated the copyright; no other changes; cover date not updated
June 20 2017	Added information about changing groups and updating delegate configurations.
December 14 2016	Changed copyright and cover; no other content changes.
December 5 2016	Updated the <i>Permissions</i> section and guide content to new corporate style; no content changes.
April 10 2015	Added information about creating different delegate configuration settings for Users and admins.
September 16 2014	Added information about the two user interfaces; no other content changes
August 22 2014	AP Users and delegates acting as Approvers may approve invoice they create on their behalf if a new Workflow setting is enabled.
April 16 2014	Changed copyright and cover; no other content changes
March 10 2014	Changed the name of Analysis/Intelligence to Concur Insight; no other content changes
March 7 2014	Addition of the: <ul style="list-style-type: none"> <li>• Restrict approvers to those with equal or higher authorized approver limit setting to the <b>Add Delegate Configuration</b> page.</li> <li>• Purchase Request Delegate-specific link in Profile to allow creation of a PR delegate separate from an Invoice delegate.</li> </ul>
December 28 2012	Made rebranding and/or copyright changes; no content changes
May 18 2012	Tool now available from within Invoice Admin user interface.
March 23 2012	Updated to clarify access to delegate configurations through the Expense Administration link, plus additional changes.

Date	Notes/Comments/Changes
November 23 2011	Updated to show the correct Invoice current interface screens and actions.
December 31 2010	Updated the copyright and made rebranding changes; no content changes
December 2009	Expense users should use <i>Expense: Delegate Configuration Setup Guide</i> Invoice users should use this guide
May 15 2009 (SU 43)	Removed the reference to delegates and authorization requests, added information about two user interfaces, and added information about new settings for users assigned by the User Administrator
Mar. 2008 (SU29)	Changed all references of travel request to authorization request



# Delegate Configuration

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**NOTE:** Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

## Section 1: Permissions

A company administrator may or may not have the correct permissions to use this feature. The administrator may have limited permissions, for example, they can affect only certain groups and/or use only certain options (*view* but not *create* or *edit*).

If a company administrator needs to use this feature and does not have the proper permissions, they should contact the company's Concur administrator.

In addition, the administrator should be aware that some of the tasks described in this guide can be completed only by SAP Concur staff. In this case, the client must initiate a service request with SAP Concur support.

## Section 2: Overview

Concur Invoice delegate configurations define the subset of invoice permissions that delegates are allowed to have within Concur Invoice. When users or User Administrators assign delegates, they can only assign rights from the subset specified when the delegate configuration was configured. The user or the User Administrator share identical sets of permissions that are available when either of them assigns a delegate, as defined in the delegate configuration. Delegate configurations can be applied to employee group configurations within Concur Invoice.

### Terminology

- **Invoice Delegates:** An employee that has been granted the right to act on behalf of another employee in preparing, submitting, and/or approving invoices
- **Invoice Request Delegates:** As Invoice Delegates above, but restricted to working only with the invoice functionality.
- **Purchase Request Delegates:** As Invoice Delegates above, but restricted to working only with the purchase request functionality.
- **Temporary Approval Delegation:** A method for designating an employee to act as an approver for a specified duration of time.
- **Delegate Restriction to Group:** A method for designating whether an employee can select delegates outside of their own group.

- **Delegated Approver:** An employee acting as a delegate for an Approver or AP User.

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**NOTE:** This delegate can approve their own invoices if a Workflow setting is enabled. See the *Delegate Self Approval* section in this document for more information.

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## Section 3: End-User Experience

### User Administrator

When a delegate configuration is created for a group, the User Administrator can access either the **Invoice Delegates** or **Purchase Request Delegates** links within User Administration after searching for and opening a user for modification. This link accesses either the **Invoice Delegates** or **Purchase Request** window where an employee can be assigned to act as an invoice delegate for either invoices or purchase requests on behalf of the employee being modified. Once this assignment is made, the delegate will immediately be able to act on behalf of the employee.

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**NOTE:** The columns that appear for the delegate will vary, depending on the settings in the delegates configuration file.

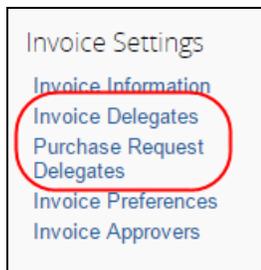
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The **Invoice Delegates** window is shown below. Purchase Request is similar:

<input type="checkbox"/>	Name	Can Prepare	Can Submit	Can View Images	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
<input type="checkbox"/>	Collins, Chris cc@randomverbs.com	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>				

### Invoice User

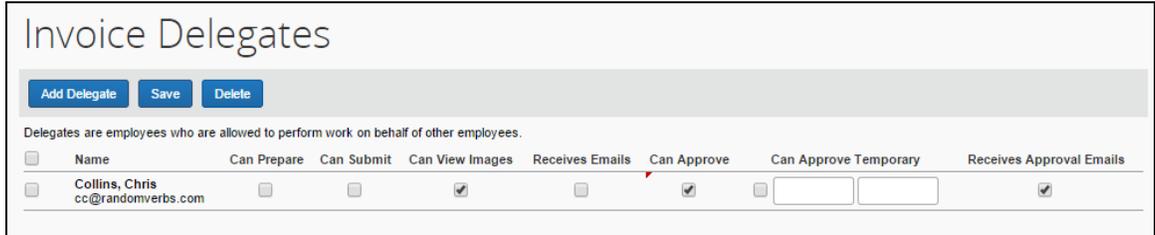
If an employee wants to select a delegate to work on his behalf, and a delegate configuration exists for the employee's group, the **Invoice Delegates** and **Purchase Request Delegates** links appear in the user's Profile, under **Invoice Settings**:



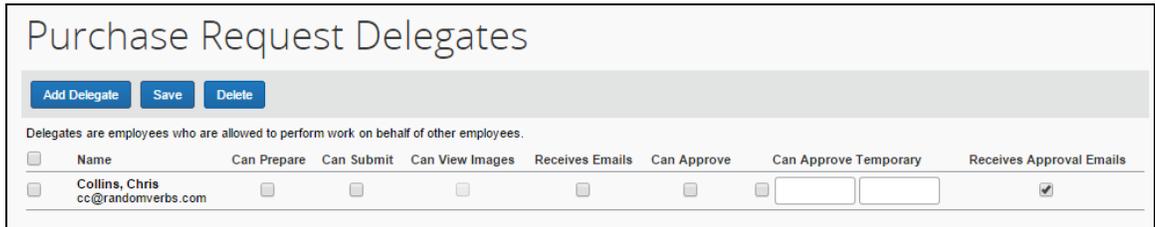
Here the employee can add, edit, or remove a delegate using options in the **Invoice Delegates** or **Purchase Request Delegates** windows.

**NOTE:** The columns that appear for the delegate will vary, depending on the settings in the delegates configuration file.

### Invoice Delegates



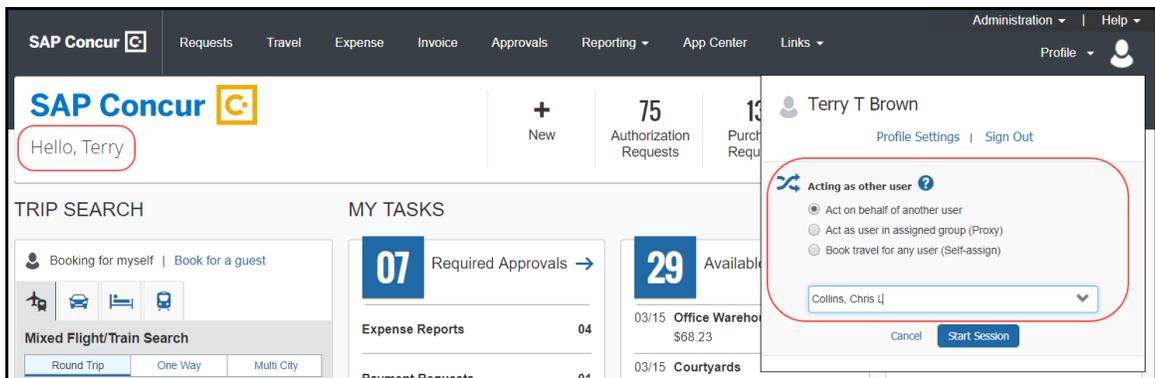
### Purchase Request Delegates



Once an employee has been assigned as a delegate in Concur Invoice, they can immediately begin working on behalf of the employee.

### Choose a User for Which to Administer

For an Invoice delegate to work on behalf of another employee, the delegate chooses the employee during their Invoice session by clicking the **Profile** menu. If the employee is assigned delegate responsibility for more than one employee, a list is displayed allowing the delegate to select the appropriate employee.



Once the delegate selects the employee for whom they will perform work, that employee's name appears in the selection box, and all the screens within Concur

Invoice are applicable to the employee for whom the delegate is working on behalf of.

Terry T Brown  
Profile Settings | Sign Out

**Acting as other user** ?

- Act on behalf of another user
- Act as user in assigned group (Proxy)
- Book travel for any user (Self-assign)

Collins, Chris L

Cancel Start Session

### Delegates: Submit a Payment or Purchase Request

A delegate can submit an invoice or a purchase request for the employee they work on behalf of only if that permission was granted first within the delegate configuration by the User Admin, and then when the delegate was added for the employee. This means that the ability to do this may be granted at the administrative level, but can be denied by the user when they add their delegate.

Invoice | Purchase Request

New Modify Remove

Name	Can Prepare	Can Submit
Default Request Delegate Configuration	Yes	Yes

Global permission (Yes) at the administrative configuration level for all users...  
....but is denied to Chris (Terry's new delegate) by Terry new assignment

Invoice Delegates

Create Save Delete

employees who are allowed to perform work on behalf of other employees.

Name	Can Prepare	Can Submit	Can View Images
Collins, Chris L cc@randomverbs.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### ***When the Delegate Cannot Submit***

When the employee is not permitted to submit, they are presented with the **Notify Employee** link instead of the **Submit** link. When the **Notify Employee** link is clicked by the delegate the system configures and sends a standard email notification to the employee that their invoice is due for submission. In turn, the delegate sees a verification that the email has been generated and sent.

The email will be similar to this:

```
To: TBrown@systems.com
From: AutoNotification@systems.com
Subject: Report Ready for Submission
=====Email Body=====
Your invoice listed below is ready for review and submission.

Report Name: New Flat Screen Monitors
Report Date: 2012-06-05 00:00:00.0
Link to Concur Invoice: http://hostname:8080/concur/servlet/concur
```

### **Delegates Email Notification**

Only a delegate representing the Approver role will receive email notifications associated with the pending approval for an invoice. The temporary delegate (those with a specified beginning and ending date) will always automatically receive the approval invoice via email, while the permanent delegate may choose whether or not they receive email based on the configuration of their preferences within My Info.

## Delegate Self-Approval

A setting, **Allow delegated approvers to approve their own requests**, is available in the **General** step when the admin creates or edits a workflow. This setting lets a company allow or prevent delegates to self-approve invoices that they create on behalf of an Approver, or as an AP User ("delegated approver").

The screenshot shows the 'Workflows' configuration page with the 'General' step selected. The 'Allow delegated approvers to approve their own requests' checkbox is circled in red. Other visible settings include 'Editable By Group(s)' set to 'Global', 'Allow employee to recall payment requests' (unchecked), 'Skip approval step if approver has already approved' (unchecked), 'Cost Object Hierarchy Type' set to 'None', 'Submit Confirmation Agreement' set to 'Acceptance of Liability', 'Approval Confirmation Agreement' set to 'Acceptance of Liability', 'Approval Request Notification' set to 'Default Payment Request Pending Notification', 'Status Change Notification' set to 'Default Payment Request Status Change Notification', and 'Sent Back Notification' set to 'Default Payment Request Status Change Notification'. The 'Allow Self Approval' checkbox is checked. Navigation buttons at the bottom include 'Cancel', '<<Previous', 'Next>>', and 'Done'.



For more information, refer to the *Concur Invoice: Workflows General Information Setup Guide*.

## Section 4: Special Considerations for Delegate Configurations

### Changing Groups

If a user moves to a different employee group configuration, and the old group configuration and new group configuration have different delegate configurations, any new delegates that are assigned will use the new group configuration for that user.

#### ***Important! - Manually Update Delegate Assignments for Changed Group***

When an employee acting as a delegate is moved to another employee group configuration, the system will not remove or update existing delegate assignments. Employees should be reminded to periodically review their delegation assignments to keep them up to date with current organizational changes.

In most cases, employees are motivated to keep these delegations accurate to ensure they have the right support for their duties, and no additional action is required. However, for some organizations it is very important to ensure only appropriate delegation is allowed.

To assist with this, the admin has two approaches available.

- The administrator may enable ONLY temporary approval delegation, ensuring that all approval delegations must be periodically updated by the employee to keep them in effect
- The administrator can manually remove the old delegate assignments to prevent confusion and, at that time, add the new delegate assignments (if any) to match the new employee group or remind users to update their own delegate assignments

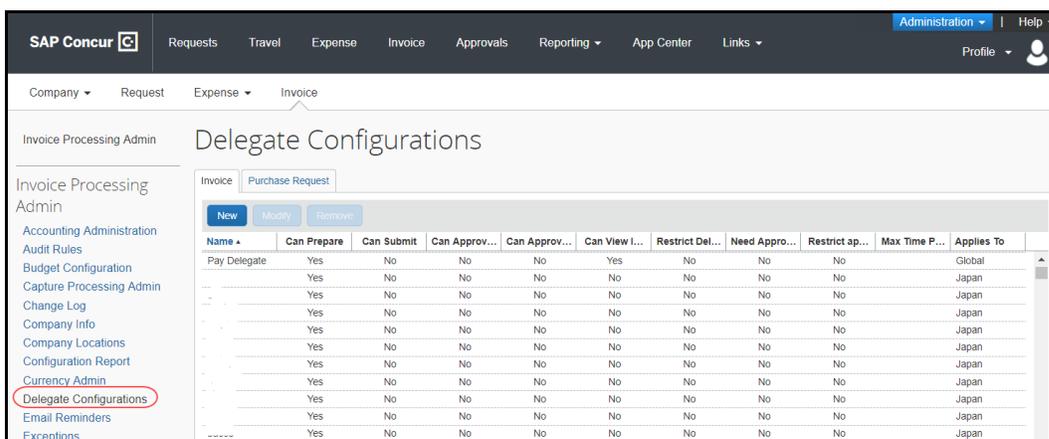
## Section 5: Access and Manage Delegate Configurations

### Access and View Payment Delegate Configurations

Invoice delegates are accessed from the **Invoice Admin** link.

► **To access the Invoice delegates tool:**

1. Click **Administration > Invoice**.
2. Click **Delegate Configurations** (left menu) The **Delegate Configurations** page appears.



3. Select the **Invoice** or **Purchase Request** tab.

The following table describes the information that is displayed on either the **Invoice** or **Purchase Request** page by default.

Name	Description
Name	The name of the payment delegate configuration. This is also a link to the <b>Edit Delegate Configuration</b> page, described in the <i>Editing an Invoice Delegate Configuration</i> section of this guide.
Can Prepare	Indicates whether the employees assigned to this configuration can prepare invoices on behalf of another employee.
Can Submit	Indicates whether the employees assigned to this configuration can submit invoices on behalf of another employee.
Can Approve (Any Time)	Indicates whether the employees assigned to this configuration can approve invoices on behalf of another employee. There is no time period associated with this action.

Name	Description
Can Approve Temporary	Indicates whether the employees assigned to this configuration can approve invoices on behalf of another employee. There is a set time period associated with this action.
Can View Images	Indicates whether the employee assigned to this configuration can view the invoices received through the imaging service.
Restrict Delegates to Group	Indicates whether the employees assigned to this configuration can select delegates that are outside of their own group.
Need Approver Role to Approve	Indicates whether the employees assigned to this configuration must select delegate approvers with the approval role assigned.
Restrict approvers to those with equal or higher authorized approver limit	If selected (enabled), the user selected to be a delegate for an Authorized Approver must also be an Authorized Approver, with the same or higher approver limit.
Maximum Time Period to Approve	Indicates a set time period, in days, for which an employee can approve invoices on behalf of another employee. <b>NOTE:</b> This field works in conjunction with the <b>Choose Dates</b> link in the <b>Delegates</b> area of both My Info and User Administration.
Applies to Groups	Displays the names of the groups for which the configuration applies.

## Create a New Invoice Delegate Configuration

The Delegate Configuration area allows a single new delegate configuration to be created for use throughout Invoice. The configuration is essentially a template that allows or denies permissions to the user or the User Admin (the subset of permissions is identical. There is no option to provide separate permissions for specific employees or by their assigned roles).

The admin may set the permissions to allow or deny for a delegate, and from this "cascading" set of permissions the user, in Profile, can select permission levels for their delegate. That is, the set of permissions available to a user to allow or deny are each allowed or disallowed at the administrator level.

Each group within your company can only have one Invoice delegate configuration. However, through inheritance a configuration created for one group can be applied to all the groups below it in the hierarchy.

► **To create a new payment delegate configuration:**

1. On the **Delegate Configurations** page, click either the **Invoice** or **Purchase Request** tab.
2. Click **New**. The **Add Delegate Configuration - Invoice** page appears.

3. Complete the required fields.

Name	Description
Configuration Name	The name of the new delegate configuration. This is a required field.
Maximum Time Period to Approve	Indicates a set time period, in days, for which an employee can approve invoices on behalf of another employee. <b>NOTE:</b> This field works in conjunction with the <b>Choose Dates</b> link in the Delegates area of both My Info and User Administration.

Name	Description
Restrictions	<p>The Configuration administrator can restrict the delegates based on the following choices:</p> <ul style="list-style-type: none"> <li>• <b>Restrict delegate selection to user's group:</b> If active, the delegates assigned to this configuration can only act on behalf of another employee within their group.</li> <li>• <b>Require approver role for approval delegation:</b> If active, the delegates assigned to this configuration must be assigned the Approver role in order to be allowed delegate approval status.</li> </ul>
Restrict approvers to those with equal or higher authorized approver limit	<p>If selected (enabled), the user selected to be a delegate for an Authorized Approver must also be an Authorized Approver, with the same or higher approver limit.</p> <p>Note the following:</p> <ul style="list-style-type: none"> <li>• When this setting is cleared (disabled), and a delegate with authority only for a lower approval limit is chosen, approval authority and functionality (<b>Can Approve</b> and <b>Can Approve Temporary</b>) become unavailable for that delegate</li> <li>• The Authorized Approver limits are evaluated <i>only</i> when the delegate is assigned. If an Authorized Approver has the same or higher limit and becomes a delegate and if the Authorized Approver delegate's limit is later lowered, Concur Invoice does not remove that delegate nor is the user or delegate notified.</li> </ul>
Applies to Groups	<p>Displays the names of the groups for which the configuration applies.</p> <p><b>NOTE:</b> Each group within your company can only have one payment delegate configuration; however, because delegate configurations use inheritance, a configuration created for one group can be applied to all the groups below it in the hierarchy. For example, if you create a configuration for the Global Group and apply inheritance to it, then all the groups that fall below the Global Group within the hierarchy will inherit the configuration.</p> <p>Select the <b>Inheritance</b> link to apply the configuration to all groups that fall below the selected group in the hierarchy.</p> <p>The <b>Inheritance</b> link works as a toggle. When selected, the link switches between <b>Inheritance</b> and <b>No Inheritance</b>. When <b>Inheritance</b> is displayed, the configuration is inherited by the groups below the selected group, in the hierarchy.</p>

Name	Description
Delegate Settings For User Administrators and Employees	<p>In this section, you can select any or all of the following options for both the user and the administrator:</p> <ul style="list-style-type: none"> <li>• <b>Delegate can prepare:</b> If active, the delegates assigned to this configuration can create invoices on behalf of another employee.</li> <li>• <b>Delegate can submit:</b> If active, the delegates assigned to this configuration can submit invoices on behalf of another employee.</li> <li>• <b>Delegate can approve (any time):</b> If active, the delegates assigned to this configuration can approve invoices on behalf of another employee. There is no time period associated with this action.</li> <li>• <b>Delegate can approve during specified period:</b> If active, the delegates assigned to this configuration can approve invoices on behalf of another employee. There is a set length of time associated with this action.</li> <li>• <b>Delegate can view images:</b> If active, the delegates assigned to this configuration can view Invoice images for invoices on behalf of another employee.</li> </ul>

4. Click **Save** to return to the **Delegate Configuration** page.

## Edit an Invoice Delegate Configuration

► **To edit an existing payment configuration:**

1. On the **Delegate Configurations** page, click either the **Invoice** or **Purchase Request** tab.
2. Select the name of the configuration to be modified in the page that appears.
3. Click **Modify**, the **Modify Delegate Configuration** page appears.

Modify Delegate Configuration - Invoice

Configuration Name:

Restrict delegate selection to user's group:

Require approver role for approval delegation:

Restrict approvers to those with equal or higher authorized approver limit:

Applies To Groups:

Maximum Time Period to Approve (Days):

Delegate Settings For User Administrators and Employees

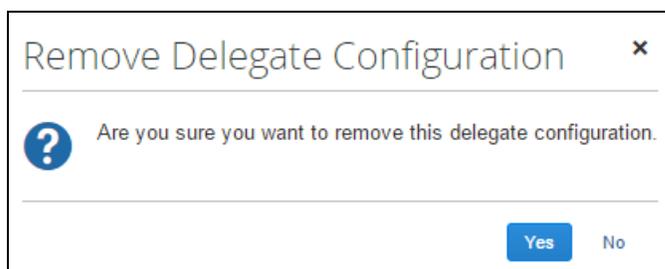
	Employee	User Administrator
Delegate can prepare:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delegate can submit :	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delegate can approve (any time):	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delegate can approve during specified period:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delegate can view images:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

4. Edit the information as necessary, and then click **Save** to return to the **Delegate Configurations** page.

## Delete an Invoice Delegate Configuration

▶ **To delete an invoice configuration:**

1. On the **Delegate Configurations** page, click either the **Invoice** or **Purchase Request** tab.
2. Select the name of the configuration to be deleted in the **Delegate Configurations** page.
3. Click **Remove**, a confirmation message appears.



4. Click **Yes**.

### **Special Considerations for Payment Delegate Configurations**

It is possible for an employee to move from one group to another within the company. When this happens, it is also possible that the delegate configuration for the employee will be incompatible with this new group. For example, an employee that is initially part of *Global Group-United States* with a delegate configuration that only applies to *Global Group-United States* is moved to *Global Group-Europe*, which has its own delegate configuration. In this case, the new delegate configuration (*Global Group-Europe*) will apply. Moving to the new group affects the employee as follows:

- Any current assignments to other users that are not allowed (that is, are out of group) by the new configuration are removed automatically.
- If the old delegate configuration had rights, such as *Can Prepare*, associated with it, but the new configuration does not allow prepare rights, then that delegate will no longer be able to prepare. These rights are automatically removed once the information about the employee changes, for example, when the employee changes from United States to Europe.

## Audit Invoice Delegate Actions

While an Invoice delegate is acting on behalf of another employee, a data trail is created including all the actions being performed. The following actions are permanently recorded:

- The name of the person who last modified the invoice.
- The name of the person who submitted the invoice, and the time the invoice was submitted.
- The name of the person who approved an invoice, and the time the invoice was approved.

