



Overview of Roles in Concur Travel and Expense

Role Name	Ability to:
Employee	<ul style="list-style-type: none"> • Update their profile (required) • Submit expense report (even if using Delegate) (required) • Create own expense report <i>(recommended)</i> • Recall expense report (before processing payment) • Book business travel in Cliqbook <i>(recommended)</i> • Assign Delegate(s) to create expense reports on his/her behalf <i>(optional)</i> • Assign Travel Arranger (Delegate) to book travel in Cliqbook <i>(optional)</i>
Approver	<ul style="list-style-type: none"> • Review expense reports, receipts, supporting documentation electronically (required) • Return expense report to Employee for correction and resubmission <i>(Delegates are also notified)</i> • Add comment(s) to expense report • Approve expense report • Insert additional Approver in workflow • Approve or Deny Cash Advance requests if identified as the Cash Advance approver • Assign “back-up” approver(s) to approve expense reports on his/her behalf for a specified period of time <i>(optional)</i> <p>Note: Approver cannot make any changes directly to the expense report with the exception of adding comments and/or attaching support documentation.</p>
Delegate (optional)	<ul style="list-style-type: none"> • Assist Employee with expense report creation, allocation, and receipt attachment • Notify Employee when report is ready for review and submission • Assist Employee with travel booking if also the Travel Arranger • Able to view Employee’s report and P-Card charges history <p>Note: Delegates cannot submit reports on behalf of Employee, nor recall reports.</p>