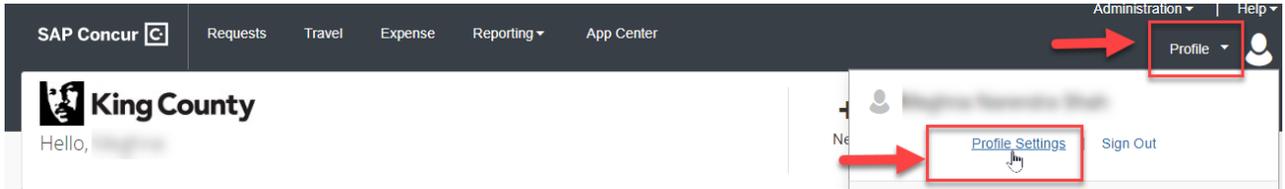
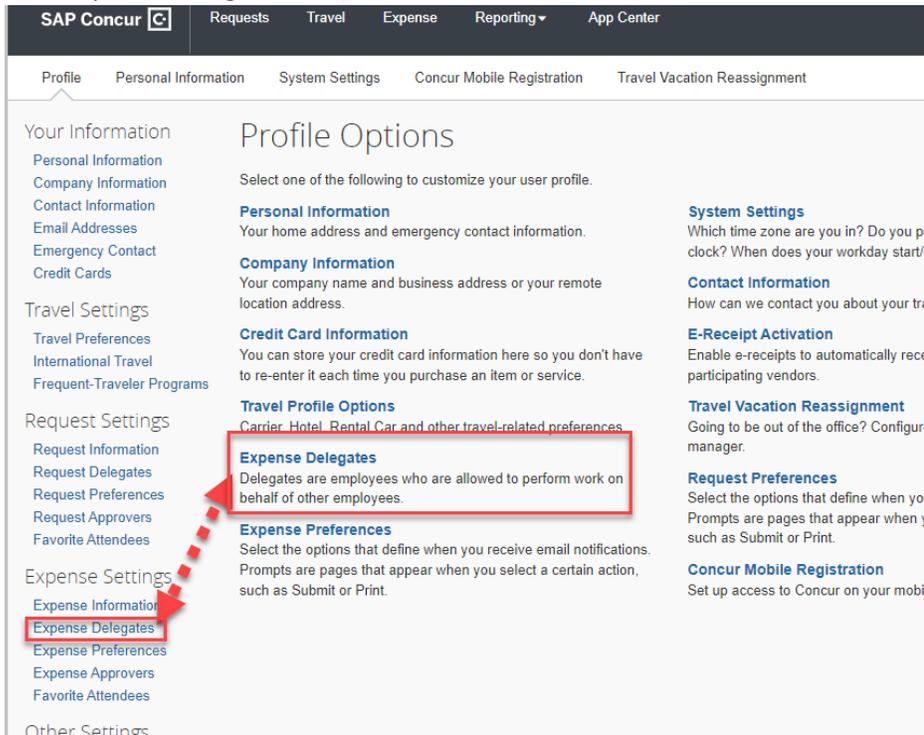


Assign Delegates in Concur

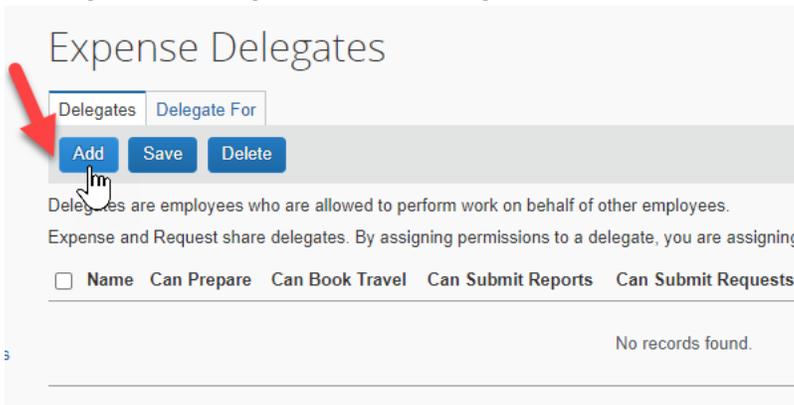
1. To assign a delegate to your user profile, click Profile, and then click Profile Settings.



2. Click Expense Delegates



3. To assign a new delegate, from the Delegates tab, click Add



4. Search for and select a delegate by employee name or email address

Expense Delegates

Delegates Delegate For

Add Save Delete

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

Search by employee name, email address or login id.

Add Cancel

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

Name Can Prepare Can Book Travel Can Submit Reports Can Submit Requests Can View Receipts Can Use Reporting Receives Emails Can Approve Can Approve Temporary Can Preview For Approver Receives Approval Emails

5. Assign permissions to the new delegate using the appropriate check box(es) – Note that the below permissions may not be available to all employees

Expense Delegates

Delegates Delegate For

Add Save Delete

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.

Name Can Prepare Can Book Travel Can Submit Reports Can Submit Requests Can View Receipts Can Use Reporting Receives Emails Can Approve Can Approve Temporary Can Preview For Approver Receives Approval Emails

No records found.

- I. Can Prepare – Ability to create travel requests and expense reports
 - II. Can Book Travel
 - III. Can Submit Reports – Can submit expense reports
 - IV. Can Submit Requests – Can submit travel requests
 - V. Can View Receipts
 - VI. Can use Reporting – This role can be assigned to two people only
 - VII. Receives Emails – This ensures the delegate receives emails related to the travel request and expense report
 - VIII. Can Approve – Can only be provided to employees that have Concur approval authority
 - IX. Can Approve Temporary – Same as above but for dates selected
 - X. Can Preview for Approver – This role can be provided to staff that do not have approval authority to review prior to the approver reviewing & approving
 - XI. Receive Approval Emails – This ensures the delegate approvers and those that can preview know when the approver has requests/reports pending approval
6. When done, click Save

Expense Delegates

Delegates Delegate For

Add Save Delete

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