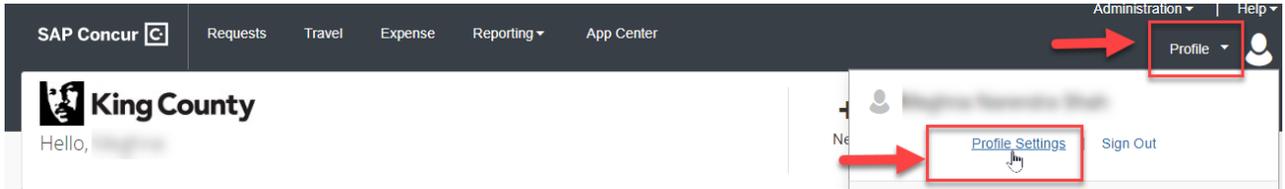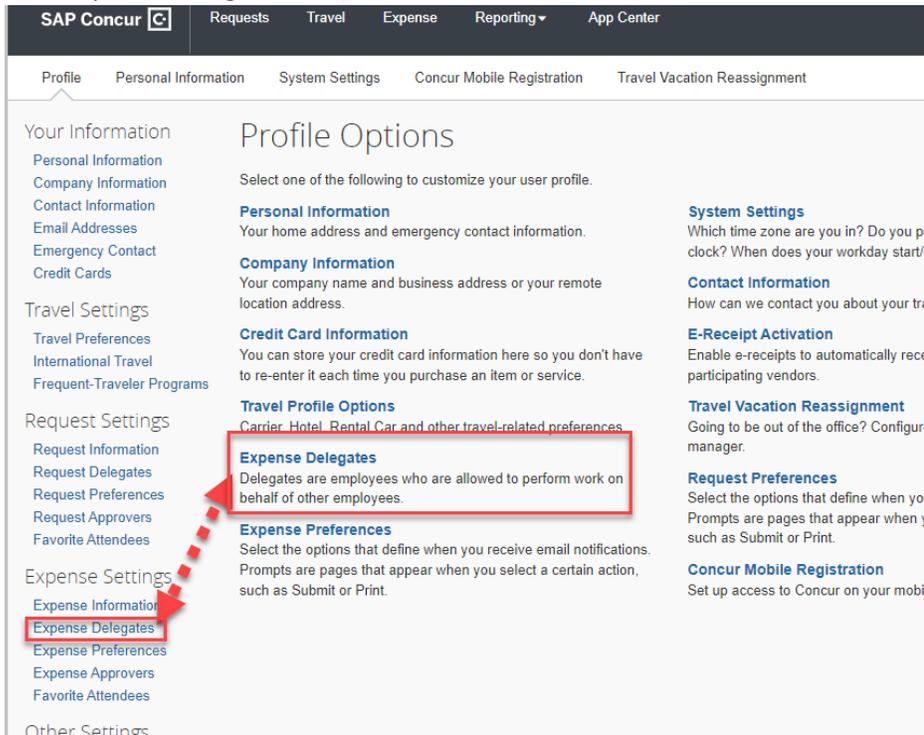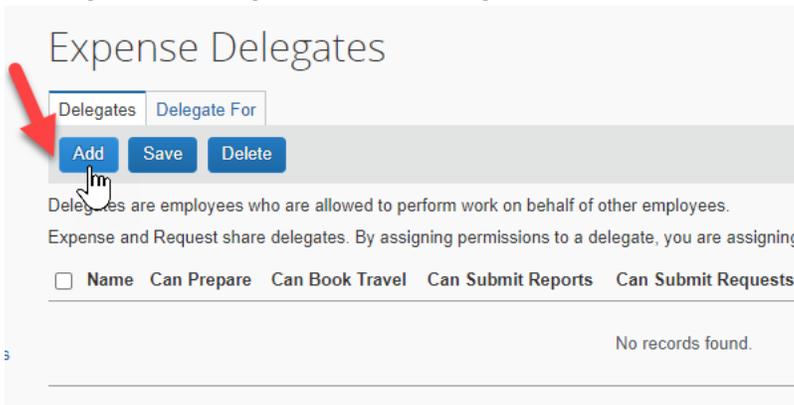# Assign Delegates in Concur

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

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

  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

Updated 4/4/2022