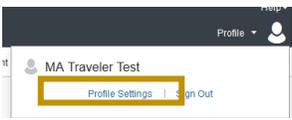
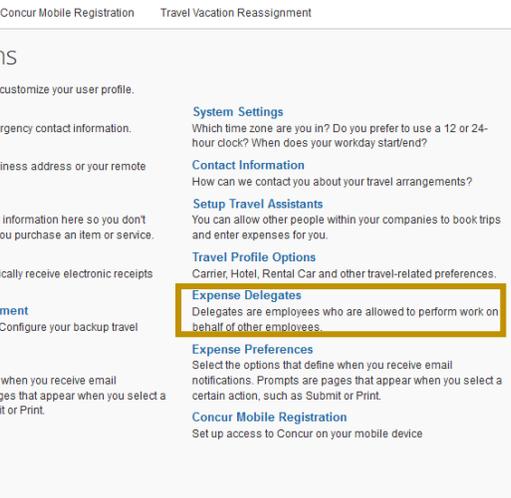
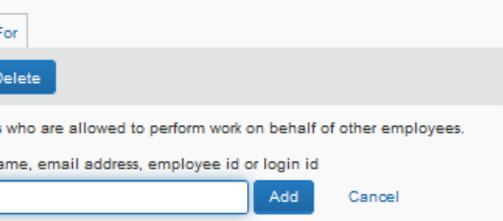


## Assigning Delegates

A delegate can perform the following:

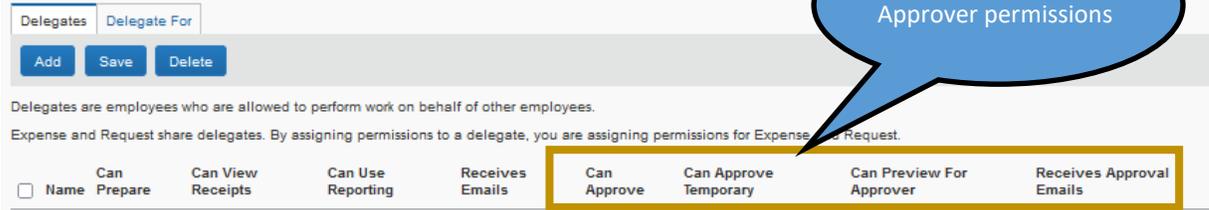
- Prepare Travel Requests and Expense Reports.
- Review incoming Requests and Expense Reports for Approval.
- Receive your emails from Concur.
- Extract travel reports on your direct reports.

If you would like the delegate to book travel via Concur on your behalf, you will also need to add them as an Assistant/Travel Arranger.

1	<p>On the Concur home page, click <b>Profile</b>, and select <b>Profile Settings</b></p>	
2	<p>Go to <b>Request Delegate or Expense Delegates</b></p> <p>Note: What you do in Expense will be reflected in Request, therefore you only have to set up the person once and they will be 'delegate' for both Travel Request and Expense Report).</p>	
3	<p>Click <b>Add</b></p>	
4	<p>Type a few first letters of the employee's last name you would like to delegate (the employee must have a Concur profile). Once the correct individual shows up, click on his/her information.</p>	

5 Select the permission you want your delegate to have and then click **Save**.

## Expense Delegates



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.

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
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- ◆ **Can Prepare** - Can prepare Request and Expense Reports on behalf of traveler but NOT submit the Request/Expense Report.
- ◆ **Can View Receipts** - View receipt images.
- ◆ **Can Use Reporting** - Can generate Concur Reports within assigned hierarchy, ie. Only for approver's direct reports. (up to 2 delegates only)
- ◆ **Receive Emails** - Receive a copy of Email Notifications (no approval emails)
- ◆ **Can Approve** - Can approve on behalf of an **approver permanently** only when the assigned delegates are a manager or confidential employees with approval role.
- ◆ **Can Approve Temporary** - Can approve on behalf of an **approver temporarily** (on leave/vacation, requires beginning and end date).
- ◆ **Can Preview for Approver**—Preview Travel Request/Expense Report for Approver. Delegates cannot approve. The delegates can do everything the approver can, except hit (final) approve button. A **green** reviewed check box will appear next to any request/expense report once previewed.



- ◆ **Receives Approval Emails** - Delegates will receive a copy of Approval Email Notifications (make sure this permission is checked no matter regardless of the other permissions granted). Email notifications will still be received by the Approver even though the approve/preview permissions were assigned to a delegate.

Just to reiterate, in order to assign a delegate permissions **Can Approve** and **Can Approve Temporary**, the delegate must have approver access in Concur and should have the same, if not higher job classification.

6 Once the employee is selected and the permissions granted, the delegated employee can now act on behalf of the traveler for Request and Expense.