Adding a Delegate in Concur

Overview
You can name users as your delegate to act on your behalf to: create travel requests, approve travel requests, approve expense reports, and prepare travel and non-travel expense reports. Note that delegates cannot submit expense reports on your behalf, they can create the reports and notify you when complete. You will receive an email to review the report and then submit the report yourself.

1. Under your Profile Settings menu, select Expense Delegates

![Profile Settings](image)

2. Click Add

3. Type in and search for the desired delegate. A list will populate based on your search. Select the appropriate user from the list.

![Expense Delegates](image)
4. Assign the permissions to your delegate by checking the box under each setting.

**Can Prepare**: Delegates can prepare expense reports on your behalf and notify you when complete. You are still required to submit the report yourself.

**Can Submit Requests**: Delegates can create and submit Travel Requests.

**Can View Receipts**: Delegates can view uploaded receipts. This will set by default if you select the Can Prepare option.

**Receives Emails**: Delegate will receive all the same Concur emails as you.

Approvers settings – These options will only be visible if you have the approver role settings. You can only name users who have the approver role to be an approver delegate.

**Can Approve**: Delegates can approve expense reports. These rights will expire after 180 days.

**Can Approve Temporary**: Set a time limit that a delegate can approve on your behalf.

**Can Preview for Approver**: Delegate can view expense reports in your approval queue but can not approve the reports.

**Receives approval Emails**: Delegate will be copied on approval related emails.

5. Click Save