## Assign a Delegate

Situation: Individual chooses to assign another person to prepare their expense reports or approve expense reports on their behalf.

## Step One: Locate Expense Delegates screen in Concur

- Log into Concur
- Click the Profile tab
- In the left hand margin, select
  Expense Delegates

My Concur Expense	Reporting	g Administration	Profile
Personal Information Cha	ange Password	System Settings	
My Profile	Select or	ne of the following to cu	istomize your us
Your Information	4	Personal Information	
Personal Information			
Company Information			
Contact Information	1	Bank Information Bank Information	
Expense Settings			
Expense Information		Expense Preferences	
Bank Information		Select the options the Submit or Print	at define when y
Expense Delegates	-	Subine of Fille.	
Expense Preferences			
Expense Approvers			
Favorite Attendees			

## Step Two: Select a Delegate and Authorize Activities they can perform on your behalf

- Click the Add button
- Use the Search field to find the person you wish to assign as your delegate

	Expense Delegates							
ł	Add Save Delete							
	Delegates are employees who are allowed to perform work on behalf of other employees.							
	Search by employee name, email address, employee id or logon id							

• When the name appears, single click on it. Their name will now appear in the box

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• Check the boxes that describe the permissions you are giving to the delegate – the activities they can do on your behalf.

ł	Expense Delegates											
	Add	Save Delete										
Delegates are employees who are allowed to perform work on behalf of other employees.												
		Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	<b>Receives Approval Emails</b>				
		EASLEY, HILARY easleyh@upenn.edu			V	$\checkmark$						

SAVE.

Note: You can assign multiple delegates, with different responsibilities based on the boxes checked next to their name.

IMPORTANT: To assign someone the ability to Receive the Emails, they must also have the box checked for the action, such as: **Can Prepare** matches with **Receives Emails**; **Can Approve** or **Can Approve Temporary** matches with **Receives Approval Emails**.