

Assign a Delegate

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

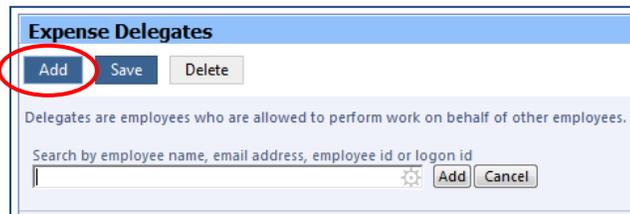
Step One: Locate Expense Delegates screen in Concur

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



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



- When the name appears, single click on it. Their name will now appear in the box
- Check the boxes that describe the permissions you are giving to the delegate – the activities they can do on your behalf.



- **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**.