Creating a Personal Delegate in Concur

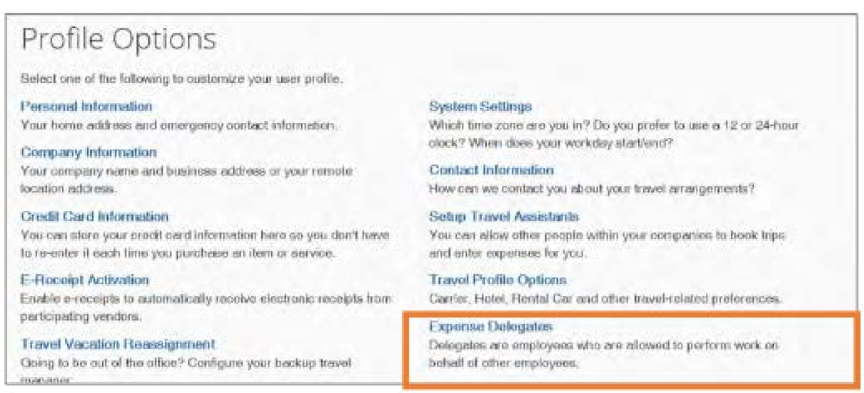
The Concur system allows you to create Delegates and Travel Assistants who can act on your behalf. A Delegate is a user who is granted permission to act on behalf of another user to perform tasks such as creating or approving requests and expense reports.

A personal delegate can assist in preparing Requests and Expense Reports on your behalf. Additional permissions may include the ability to view receipt images and/or receive copies of emails. However, Personal Delegates cannot submit reports on your behalf. Personal Delegates can use the Notify feature to send an email notification to you when a request or report is ready to be submitted.

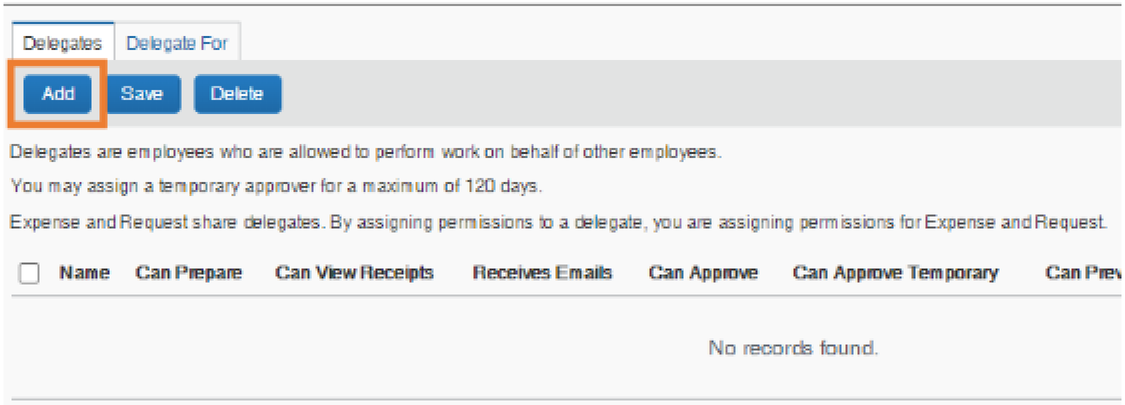
Delegates may be managed and assigned through the Request Delegates link on the Profile Options page or by following the steps below to access the Expense Delegates link.

Follow the steps below to create a delegate:
1. Click the Profile link
2. Click the Profile Settings link

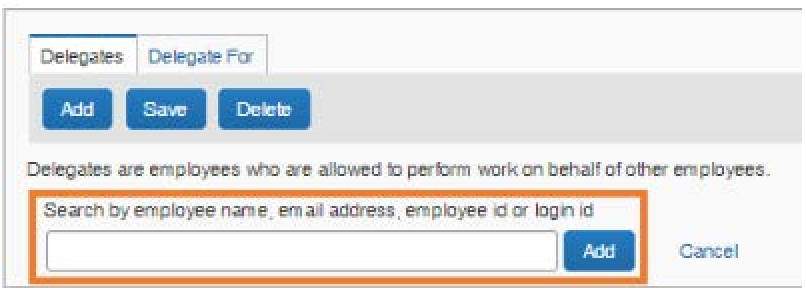
Result: You will be directed to the Profile Options page.
3. Click the Expense Delegates link.



4. Click the Add button.



5. Begin entering the name of the employee you want to assign as a delegate.



6. Click on the employee you wish to add as a delegate.
7. Select the task(s) you want to delegate or perform on your behalf and what notifications they should receive

Personal Delegate Options:
• Can Prepare – This allows the delegate to prepare requests or expenses on your behalf.
• Can View Receipts – This allows the delegate to view receipts that are uploaded to your account in the Concur system.
• Receives Emails – This allows the delegate to receive the same email notifications that you receive based on your email notification settings

8. Click the **Save** button.