

## Creating a Personal Delegate in Concur

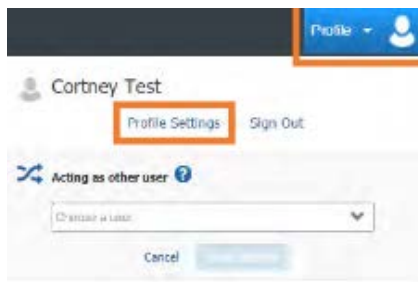
The Concur system allows you to create Delegates and Travel Assistants who can act on your behalf. A Delegate is a user who is granted permission to act on behalf of another user to perform tasks such as creating or approving requests and expense reports.

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.

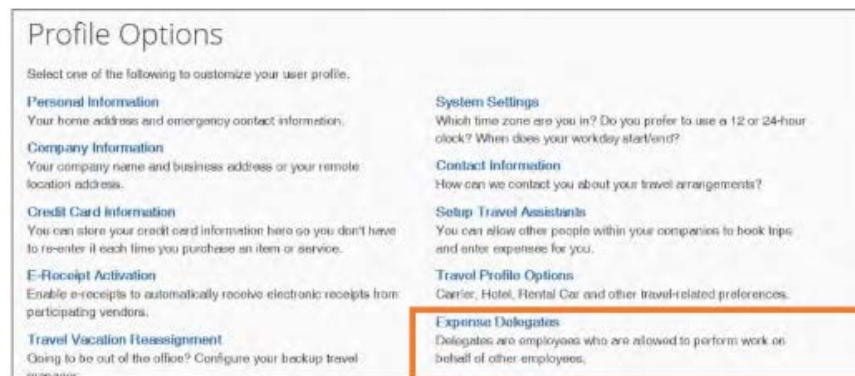
Follow the steps below to create a delegate:

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.

Delegates

Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

You may assign a temporary approver for a maximum of 120 days.

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	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver
--------------------------	------	-------------	-------------------	-----------------	-------------	-----------------------	--------------------------

No records found.

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

Delegates

Delegate For

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 login id

Add Cancel

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	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

8. Click the **Save** button.

Delegates

Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

You may assign a temporary approver for a maximum of 120 days.

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.