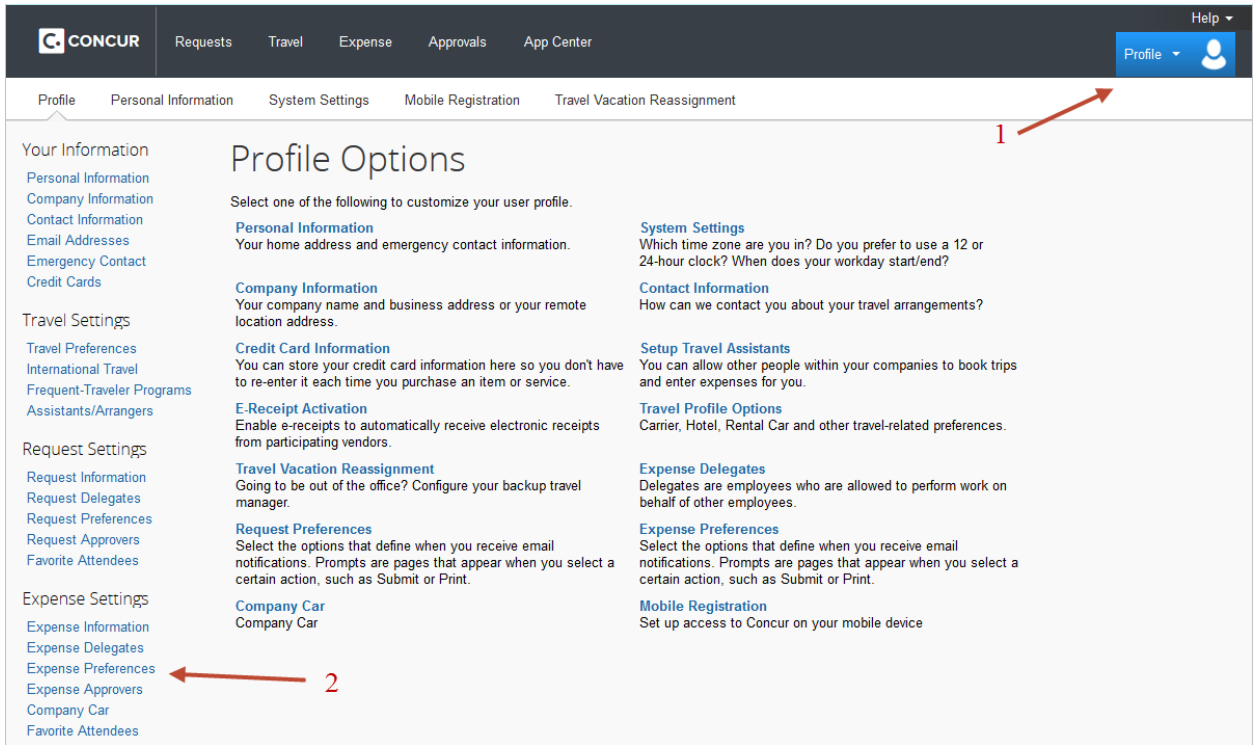
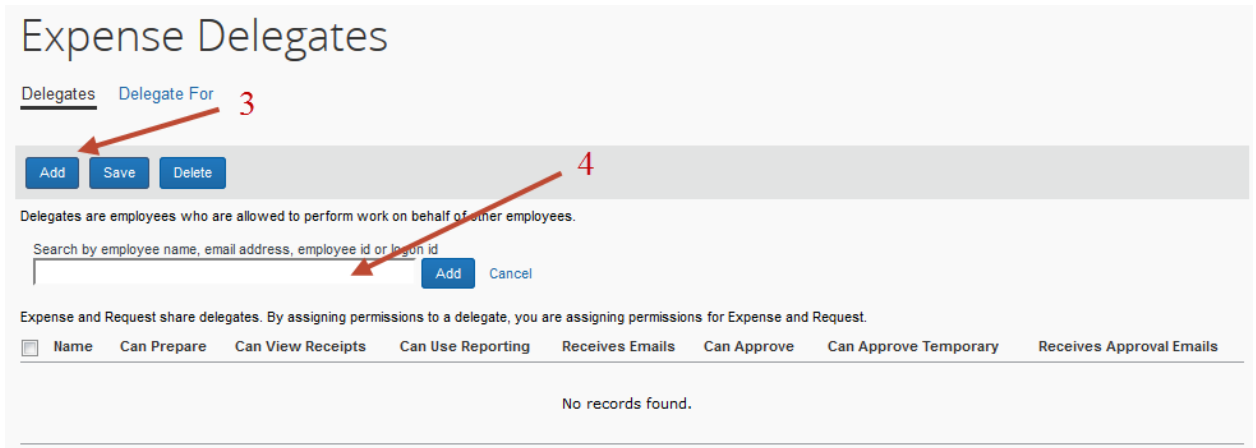


Concur-How to Set Up an Expense Delegate

- 1) Upon logging into Concur, click the Profile dropdown and select profile settings.
- 2) Click Expense Delegates



- 3) Click Add
- 4) Type in your search.
 - a. This could be the last name, partial uin, email, etc.



- 5) The list of options will filter based on your search parameters
- 6) Choose the appropriate user from the list.

Expense Delegates

[Delegates](#) [Delegate For](#)

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

ZNever@tamus.edu - Bill ZNever

ZNever@tamus.edu - Bill ZNever
ZNever@tamus.edu
Employee ID: znever

When you assign permissions to a delegate, you are assigning permissions for Expense and Request.

Can Use Reporting Receives Emails Can Approve Can Approve Temporary Receives Approval Emails

No records found.

- 7) If it doesn't automatically add the user to your list, click the add button next to the search field
- 8) Assign the permissions you wish to give this delegate
 - a. Can Prepare-This user may prepare expense reports on your behalf. You will still be required to submit the report
 - b. Can View Receipts-Should check by default when selecting Can Prepare. This allows this user to view your receipt store, ereceipts, receipts images, etc.
 - c. Can Use Reporting-If you have any reporting rights (typically restricted to dept heads) you may assign that reporting license to 2 individuals
 - d. Receives Emails-This user will be copied by all emails generated by Concur addressed to you
 - e. Can Approve-You are sharing your ability to approve reports with this user.
 - f. Can Approve Temporary-This is a date range. You are giving this user temporary access to approve reports and requests on your behalf
 - g. Receives Approval Emails-This user will be copied on all emails generated by Concur notifying you of requests and reports pending your approval

Expense Delegates

[Delegates](#) [Delegate For](#)

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

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	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
<input type="checkbox"/>	ZNever, Bill ZNever@tamus.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>

- 9) Click Save
- 10) Once you have clicked save, the next time your delegates logs into Concur, they will be able to delegate into your profile to perform the functions you have given them permission to perform.