

Search



KB0011373

# How to Add a Delegate

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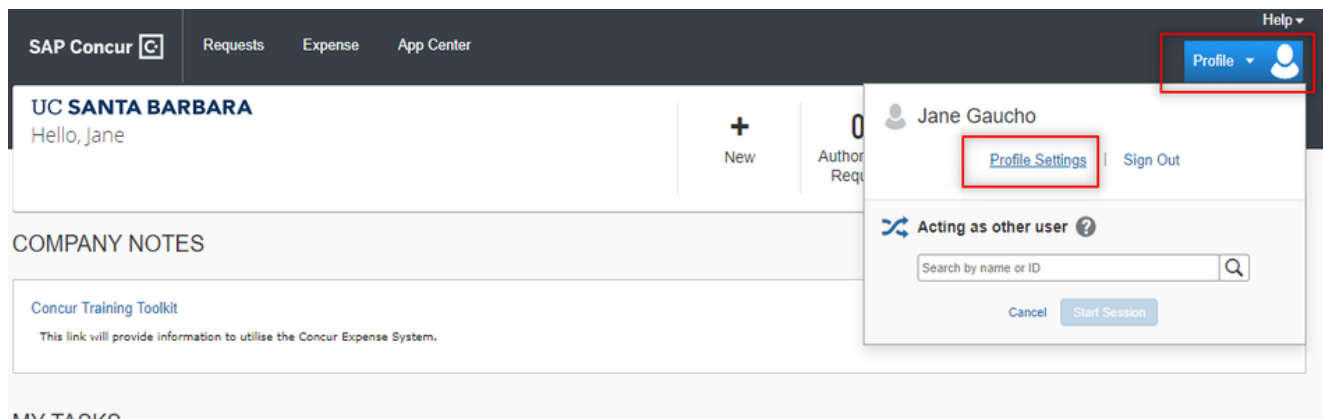
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about a year ago • 164 Views • ★★★★★

## How to Add a Delegate

### System Navigation

- From the Concur main dashboard (home page), click into **Profile** in the top right of the screen.
- Then, click **Profile Settings**



- From the Profile Settings page, navigate to either Expense Delegates or Request Delegates, depending on which functionality you would like to add a delegate for.
- The left hand bar will have all the options available for selection.

## Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses

## Request Settings

- Request Information
- Request Delegates**
- Request Preferences
- Request Approvers
- Favorite Attendees
- International Travel

## Expense Settings

- Expense Information
- Expense Delegates**
- Expense Preferences
- Expense Approvers
- Favorite Attendees

## Other Settings

- System Settings
- Connected Apps
- Concur Connect

# Profile Options

Select one of the following to customize your user profile.

**Personal Information**  
Personal Information

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

**Expense Preferences**  
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

**Concur Mobile Registration**  
Set up access to Concur on your mobile device

**System Settings**  
Which time zone are you in? Do you clock? When does your workday sta

**Request Preferences**  
Select the options that define when Prompts are pages that appear whe such as Submit or Print.

**Change Password**  
Change your password.

- From within the Expense/Request Delegates Screen, you can view:
  - Your Delegates - users who are able to complete tasks in Concur on your behalf (ie. people who are able to “delegate in” for you; **editable**)

## Expense Delegates

Delegates Delegates For

Add Save Delete

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 Submit Requests	Can View Receipts	Receives Emails
<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Test, AA1 aa1@ucsb.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Who you are a Delegate For - users that you can complete tasks in Concur on behalf of (**not editable, only delete-able**)

# Expense Delegates

Delegates Delegate For

Delete

This employee may act as a delegate for the listed employees.

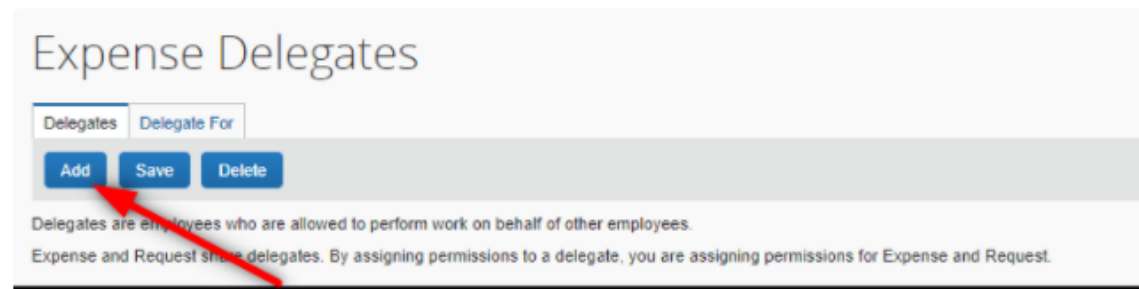
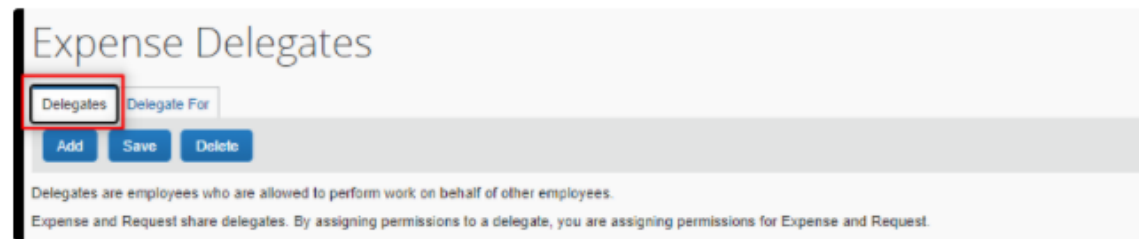
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Requests	Can View Receipts	Receives Emails
<input type="checkbox"/>	Test, Traveler1 traveler1@ucsb.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**⚠ Please Note:** Once you delete someone you are able to delegate in for, you cannot add them back unless they add you again as a delegate. So only delete people you are a delegate for if you are certain.

## How to Add a Delegate

- From within the Expense/Request Delegates screen, click on Add



- The System will prompt you to search for the employee/user that you would like to add as a delegate for yourself

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

The screenshot shows a web interface for managing delegates. At the top, there are tabs for 'Delegates' and 'Delegate For'. Below the tabs are three buttons: 'Add', 'Save', and 'Delete'. A descriptive text states: 'Delegates are employees who are allowed to perform work on behalf of other employees.' Below this is a search prompt: 'Search by employee name, email address, employee id or login id'. A search input field contains the text 'Test, AA2'. A dropdown menu is open below the search field, listing three search results:

- Test, AA2**  
aa2@ucsb.edu  
User ID: aa2  
Logon ID: aa2@ucsb.edu
- Test, AA3**  
aa3@ucsb.edu  
User ID: aa3  
Logon ID: aa3@ucsb.edu
- Test, AA4**

- Select the user you would like to add as your delegate, and then flag which functions you would like to enable for them.

<b>Can Prepare</b>	Delegate can create expense reports and requests on behalf of the user
<b>Can Submit Requests</b>	Delegate can submit pre-authorization requests on behalf of the user (we do not allow delegates to submit expense reports)
<b>Can View Receipts</b>	Delegate is able to view uploaded receipts in the user's account
<b>Receives Emails</b>	Delegate will receive email alerts regarding the user's account/reports/requests