

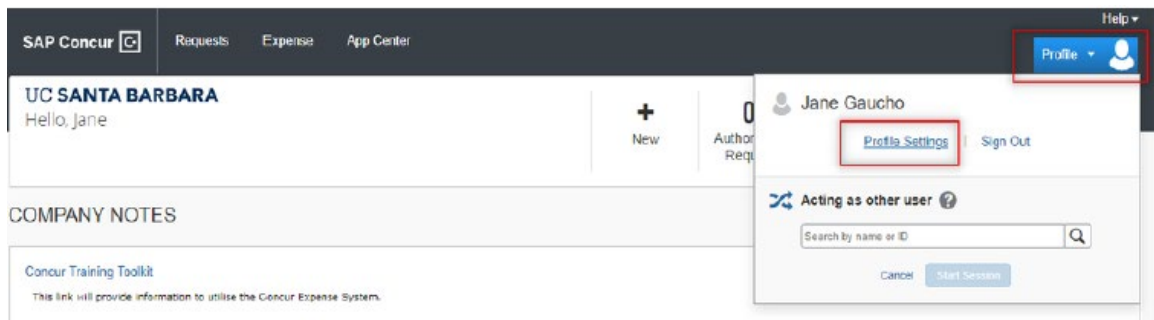
How to Add a Delegate in Concur

Overview

This guide explains how to add a delegate in Concur so another user can perform tasks on your behalf.

Step 1: Open Profile Settings

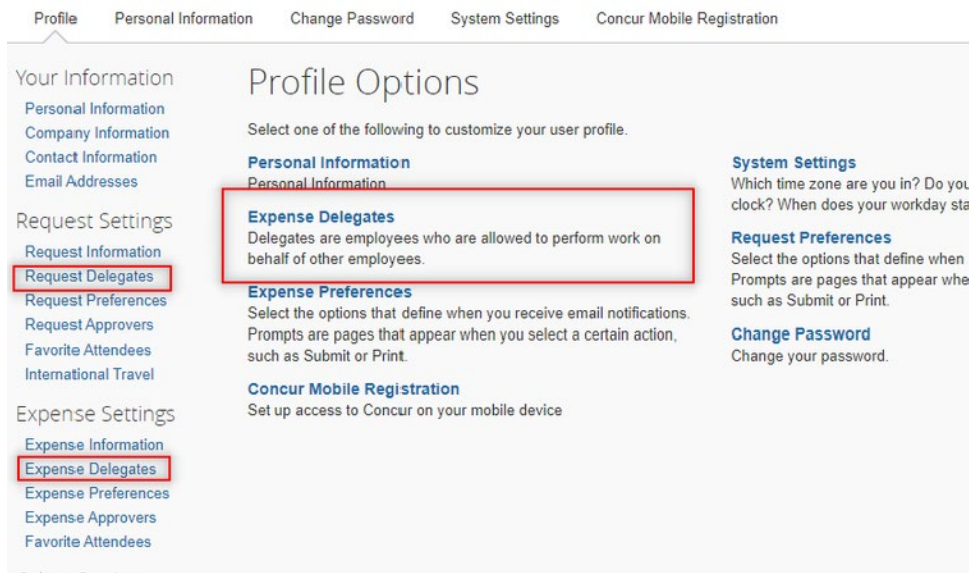
1. From the Concur main dashboard (home page), locate the Profile option in the top-right corner.
2. Click Profile.



3. Select Profile Settings from the dropdown menu.

Step 2: Navigate to Delegates

4. In the Profile Settings page, use the left-hand navigation menu.
5. Choose Expense Delegates (for expense-related tasks) or Request Delegates (for request-related tasks).



Step 3: Understand Delegate Sections

Your Delegates: Users who can complete tasks on your behalf (editable).

Expense Delegates

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"/>	[Redacted]	<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 for whom you can complete tasks (not editable, but removable).

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 the user adds you again as a delegate. So only delete people you are a delegate for if you are certain.

Step 4: Add a Delegate

6. Click the Add button.

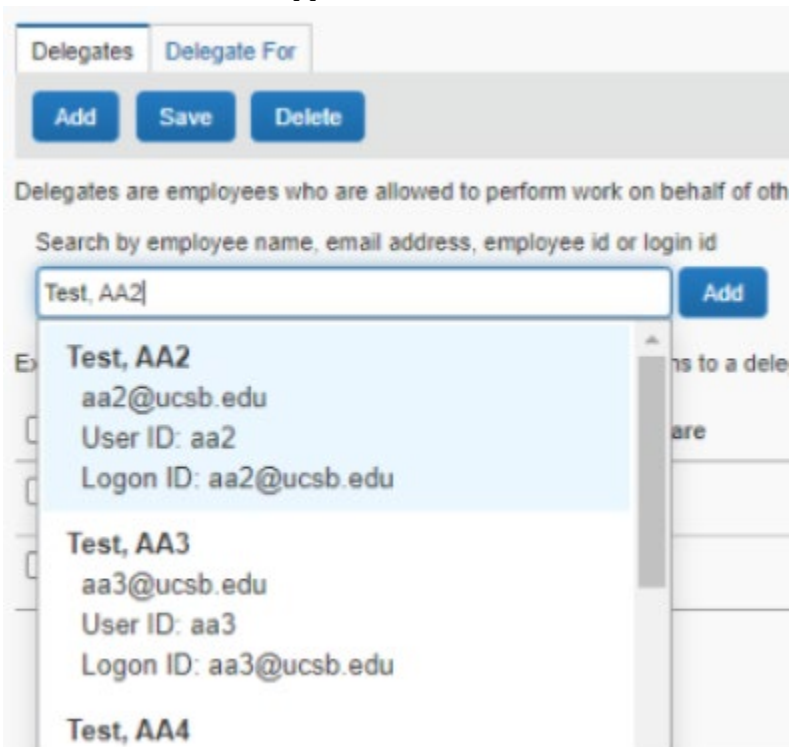
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7. A search window will appear.



8. Enter the name of the employee/user you want to add.
9. Select the correct user from the search results.

Step 5: Assign Permissions

10. After selecting the user, choose which functions they are allowed to perform.
11. Save your selections to finalize the delegate setup.