

# Concur Quick Reference Guide: Adding delegate access

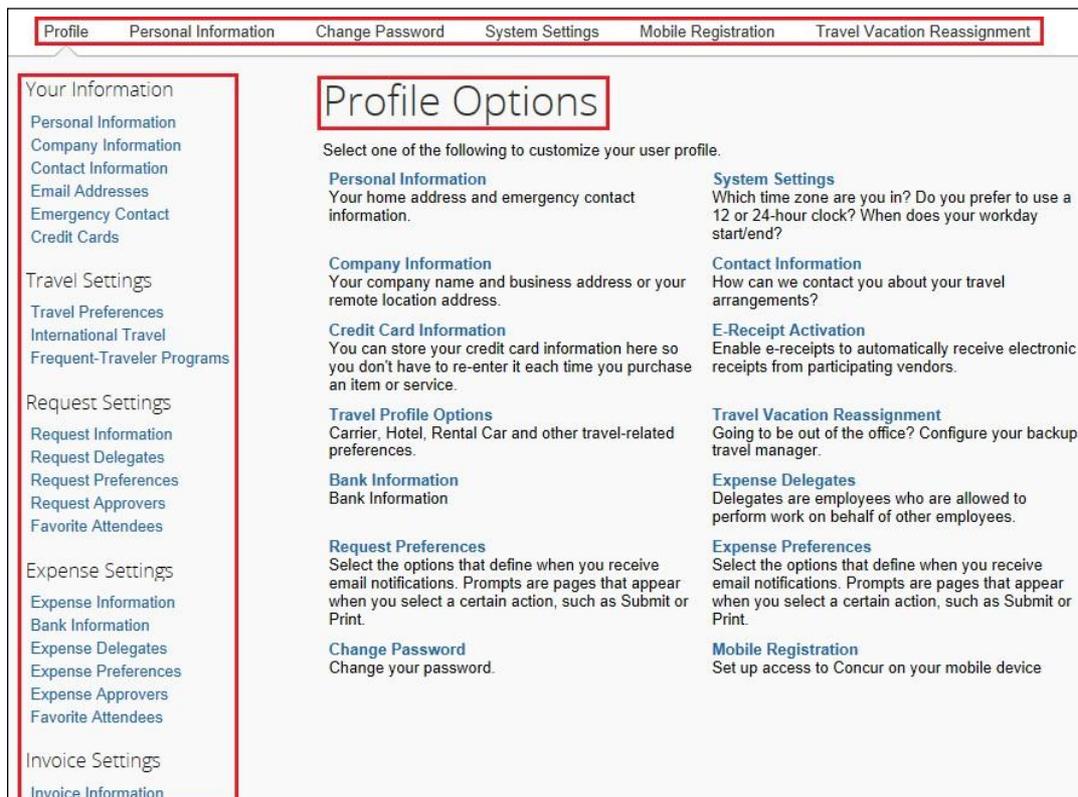
You can nominate a delegate within Concur to book travel / manage expenses on your behalf.

## Step 1: Accessing your Profile page

### How to...

- On the **Profile Options** page, review your information, and select the appropriate links to update your profile information.

### Additional Information



The screenshot shows the 'Profile Options' page in Concur. At the top, there is a navigation bar with the following links: Profile, Personal Information, Change Password, System Settings, Mobile Registration, and Travel Vacation Reassignment. The main content area is titled 'Profile Options' and contains a list of settings categories. A red box highlights the 'Profile Options' title and the left-hand navigation menu. The categories listed are: Personal Information, System Settings, Company Information, Contact Information, Credit Card Information, E-Receipt Activation, Travel Profile Options, Travel Vacation Reassignment, Bank Information, Expense Delegates, Request Preferences, Expense Preferences, Change Password, and Mobile Registration. Each category has a brief description of what it covers.

## Step 2: Completing your information

### How to...

- Click the appropriate links on the **My Profile – Personal Information** page to complete your profile information, as needed.

### Additional Information

To avoid re-entering personal and permanent information about yourself (phone number, contacts, credit card information etc.), complete your profile after logging onto Concur for the first time and update it whenever your information changes.

Update your Travel and Expense preferences and any other appropriate information.

### Step 3: Adding a delegate

#### How to...

1. In the **Expense Settings** section, click **Expense Delegates**.

#### Additional Information

On the **Expense Delegates** page, you will give other Expense users the ability to prepare, submit, approve, view receipts, approve reports, or receive emails on your behalf.

### Expense Delegates

[Delegates](#) [Delegate 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 Book Travel	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Approver, Erick erickapprover@p00103105exu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Peterson, Sue suep_ls_en@p00103105exu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Click **Add**.
3. In the **Search by employee name, email address or logon ID** field, type the last name of the delegate you wish to add.
4. Click the name of the delegate from the list.
5. Select the appropriate task check boxes.
6. To add additional delegates, repeat steps 2-5.
7. Click **Save**.

As you begin to type the name, Expense provides a list of users to select from.

The delegate can only perform the tasks you select. A delegate will need to be an approver in order to approve reports on your behalf.

You can see if others have added you as their delegate by clicking the **Delegate For**.

### 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 Book Travel	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Never, William suep_ls_en@p00103105exu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>