

## 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

The screenshot shows the Concur user interface. At the top, there is a navigation bar with 'CONCUR' logo and menu items: Requests, Travel, Expense, Approvals, App Center, and a Help dropdown. On the right side of the navigation bar, there is a 'Profile' dropdown menu with a user icon. Below the navigation bar, there is a sub-navigation bar with links: Profile, Personal Information, System Settings, Mobile Registration, and Travel Vacation Reassignment. The main content area is titled 'Profile Options' and contains several sections: 'Your Information' (Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, Credit Cards), 'Travel Settings' (Travel Preferences, International Travel, Frequent-Traveler Programs, Assistants/Arrangers), 'Request Settings' (Request Information, Request Delegates, Request Preferences, Request Approvers, Favorite Attendees), and 'Expense Settings' (Expense Information, Expense Delegates, Expense Preferences, Expense Approvers, Company Car, Favorite Attendees). A red arrow labeled '1' points to the 'Profile' dropdown in the top right. Another red arrow labeled '2' points to the 'Expense Delegates' link in the 'Expense Settings' section of the left sidebar.

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

The screenshot shows the 'Expense Delegates' page. At the top, there is a header 'Expense Delegates' and two tabs: 'Delegates' and 'Delegate For'. Below the tabs, there is a row of buttons: 'Add', 'Save', and 'Delete'. A red arrow labeled '3' points to the 'Add' button. Below the buttons, there is a text description: 'Delegates are employees who are allowed to perform work on behalf of other employees.' Below the description, there is a search bar with the placeholder text 'Search by employee name, email address, employee id or login id'. A red arrow labeled '4' points to the search bar. To the right of the search bar, there are 'Add' and 'Cancel' buttons. Below the search bar, there is a text description: 'Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.' Below the description, there is a table with columns: 'Name', 'Can Prepare', 'Can View Receipts', 'Can Use Reporting', 'Receives Emails', 'Can Approve', 'Can Approve Temporary', and 'Receives Approval Emails'. Below the table, there is a message: 'No records found.'

- 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.