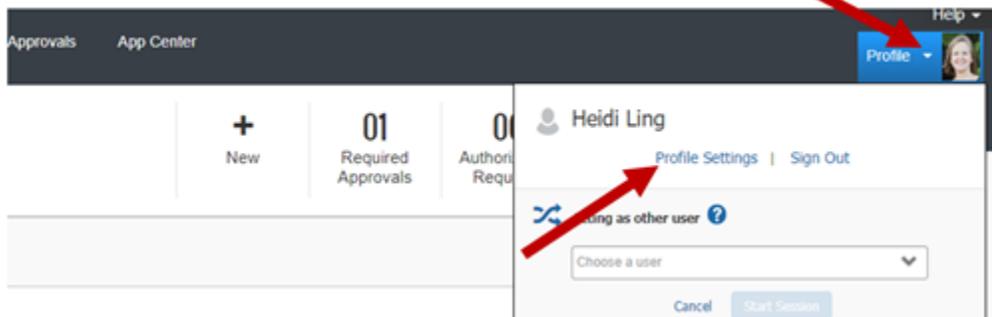
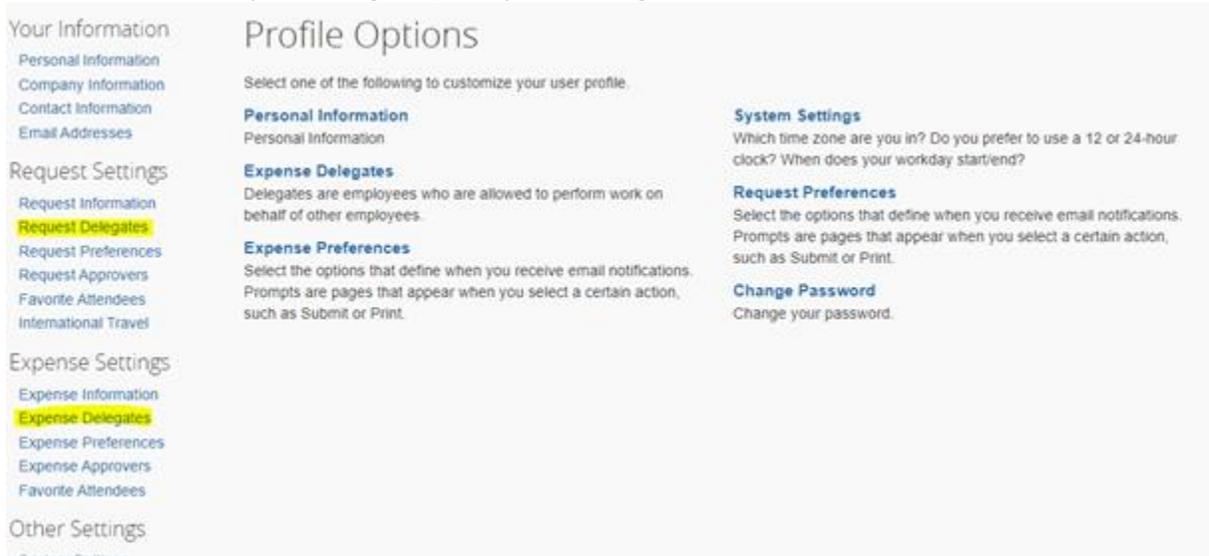


## Add a Delegate Quick Guide

1. Log in to Concur.
2. Click the Profile dropdown and select Profile Settings.



3. Click Request Delegates, or Expense Delegates.



4. Click Add.

## Expense Delegates

Delegates Delegate For

Add

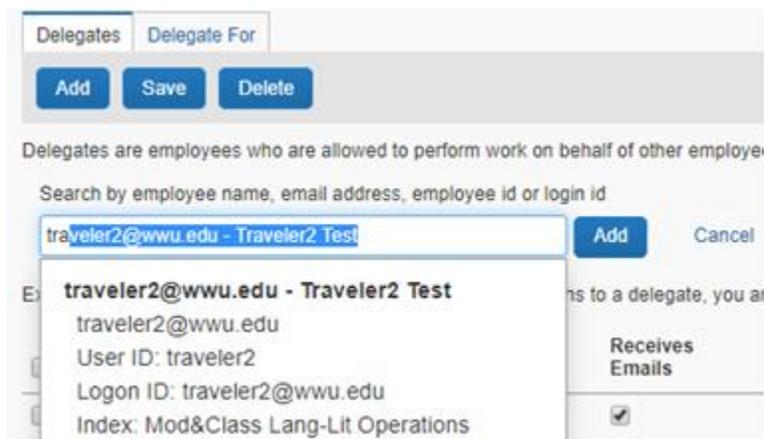
Save

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.

5. Search for an employee; type in your search:
  - ✓ This could be the last name, partial W#, email, etc.
  - ✓ The list of options will filter based on your search parameters
  - ✓ Choose the appropriate user from the list
  - ✓ If clicking the user doesn't automatically add the user to your list, click the add button next to the search field



The screenshot shows the 'Expense Delegates' interface. At the top, there are tabs for 'Delegates' and 'Delegate For', and buttons for 'Add', 'Save', and 'Delete'. Below this is a text box with the instruction: 'Delegates are employees who are allowed to perform work on behalf of other employees.' Underneath is a search field with the text 'Search by employee name, email address, employee id or login id'. The search field contains the text 'traveler2@wwu.edu - Traveler2 Test'. To the right of the search field are 'Add' and 'Cancel' buttons. Below the search field is a dropdown menu showing the search results for 'traveler2@wwu.edu - Traveler2 Test'. The results include: 'traveler2@wwu.edu', 'User ID: traveler2', 'Logon ID: traveler2@wwu.edu', and 'Index: Mod&Class Lang-Lit Operations'. To the right of the dropdown menu is a 'Receives Emails' checkbox, which is checked.

6. Assign the permissions you wish to give this delegate
  - ✓ Can Prepare: This user may prepare expense reports on your behalf. You will still be required to submit the report.
  - ✓ Can View Receipts: Will be checked by default when selecting Can Prepare. This allows this user to view your receipt store, eReceipts, receipts images, etc.
  - ✓ Can Use Reporting: If you have any reporting rights (typically restricted to dept heads) you may assign that reporting license to 2 individuals.
  - ✓ Receives Emails: This user will be copied by all emails generated by Concur addressed to you.



- ✓ Can Approve: As an approver, you are delegating your ability to approve reports with this user.
- ✓ Can Approve Temporary: Add in a date range. You are giving this user temporary access to approve reports and requests on your behalf.
- ✓ Receives Approval Emails: This user will be copied on all emails generated by Concur notifying you of requests and reports pending your approval.

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

	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview Approver
je @wwu.edu	<input type="checkbox"/> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> <input type="text"/> </div> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> <input type="text"/> </div>	<input type="checkbox"/>				

7. Click Save.
8. 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.
9. Note: The above steps set up Delegated assigned permissions for both Request and Expense.