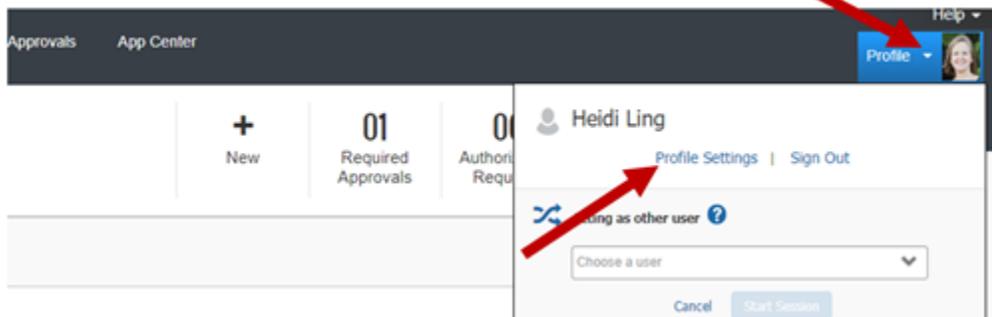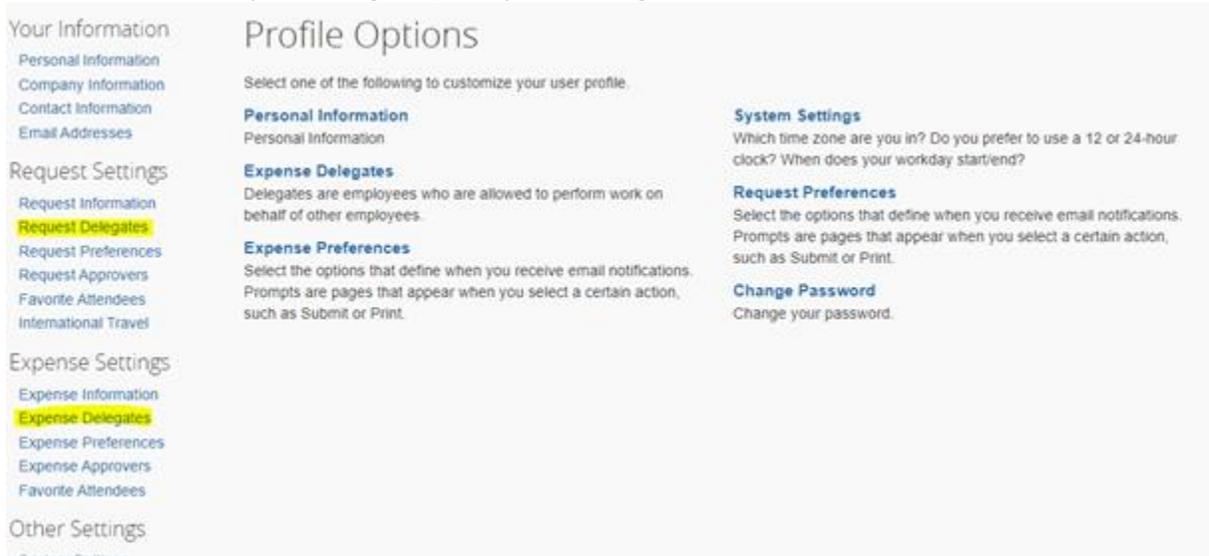# Add a Delegate Quick Guide

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
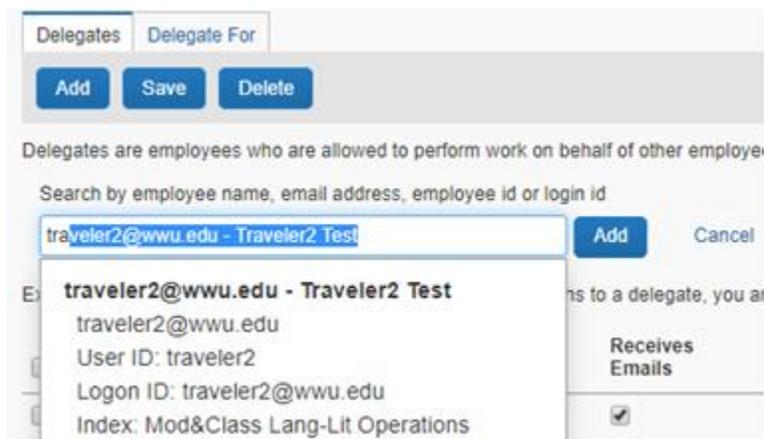
| Delegates | Delegate For |

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

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

| Delegates | Delegate For |

Add **Save** **Delete**

Delegates are employees who are allowed to perform work on behalf of other employee

Search by employee name, email address, employee id or login id

traveler2@wwu.edu - Traveler2 Test   **Add**   Cancel

traveler2@wwu.edu - Traveler2 Test
traveler2@wwu.edu
User ID: traveler2
Logon ID: traveler2@wwu.edu
Index: Mod&Class Lang-Lit Operations

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.

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.