

Add or Remove Request/Expense Delegates

Overview

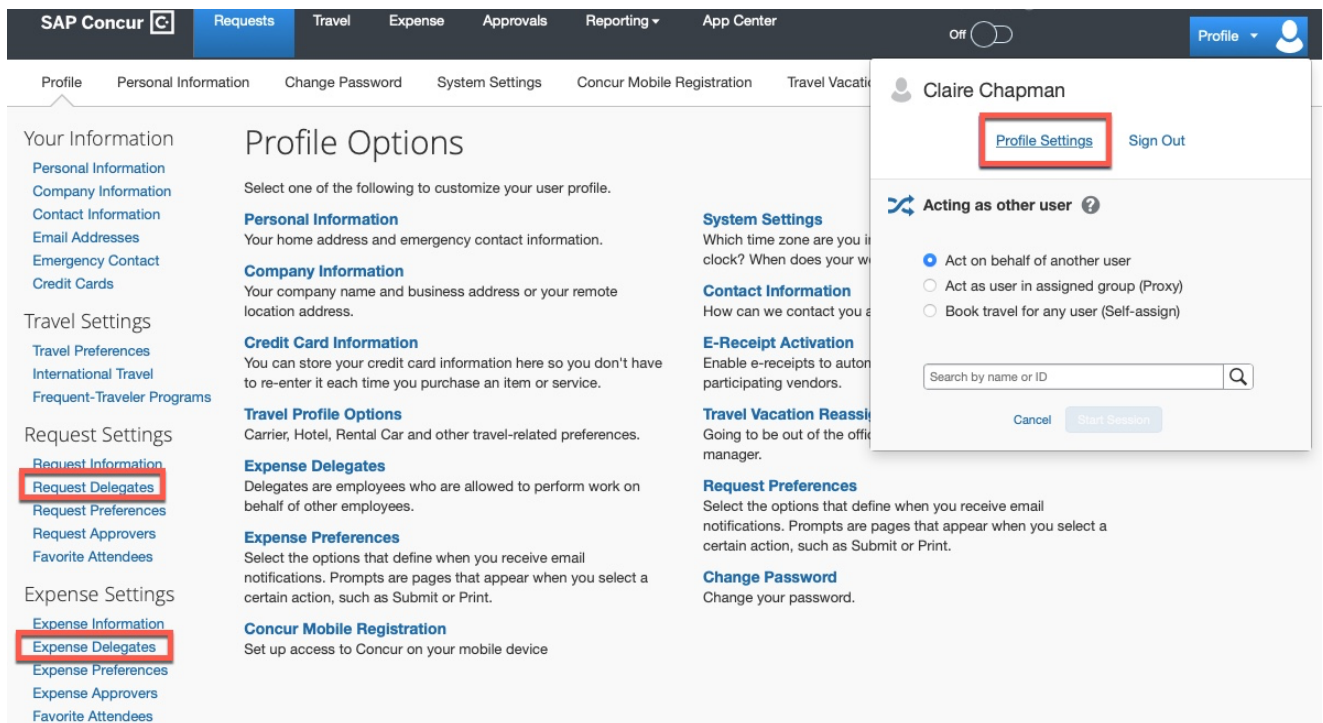
This training explains how to add, edit, or remove a Request/Expense Delegate who can have visibility to your travel and expenses. If you are a P-Card holder you want to be sure to add your assigned liaison as your Delegate in Concur.

Step One:

Locate the Request Delegate or Expense Delegate link in the Profile Settings page. Changing information in one of these sections automatically applies the changes to the other, they are connected lists.

From the Concur Home Page:

1. Select Profile > Profile Settings.
2. Select Request Delegate or Expense Delegate from the left-hand menu bar.



The screenshot shows the SAP Concur interface. At the top, there is a navigation bar with tabs for Requests, Travel, Expense, Approvals, Reporting, and App Center. A user profile dropdown is visible in the top right corner, showing the name 'Claire Chapman' and a 'Profile Settings' link highlighted with a red box. Below the navigation bar, the main content area is titled 'Profile Options' and contains several sections: Personal Information, Company Information, Credit Card Information, Travel Profile Options, Expense Delegates, Expense Preferences, and Concur Mobile Registration. On the left side, there is a sidebar menu with categories like 'Your Information', 'Travel Settings', 'Request Settings', and 'Expense Settings'. Under 'Request Settings', 'Request Delegates' is highlighted with a red box. Under 'Expense Settings', 'Expense Delegates' is also highlighted with a red box. A 'Acting as other user' dialog box is open on the right side of the screen, showing options to act on behalf of another user, act as a user in an assigned group, or book travel for any user.

Step Two:

In either the Request or Expense Delegate section, click Add to add a user as a delegate.

Request 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 Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Patton, Allison APATTON@clemsn.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Pigeon, John JPIGEON@clemsn.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Step Three:

Begin typing either the employee name, email address, or employee id. Once your choice appears click the name then click add.

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

TONKIN@clemsn.edu - Charles Tonkin **Add** [Cancel](#)

Ex TONKIN@clemsn.edu - Charles Tonkin
TONKIN@clemsn.edu
User ID: C51470205
Logon ID: C51470205@clemsn.edu

Tonkin, Jennifer
JTONKIN@clemsn.edu
User ID: C89667981
Logon ID: C89667981@clemsn.edu

Step Four:

1. Check the boxes that apply:
 - a. Can Prepare – allows delegate to prepare requests/expense reports on your behalf.
 - b. Can Book Travel
 - c. Can View Receipts – allows delegate to view receipts that the user has uploaded.
 - d. Can Use Reporting – allows delegate to access reports based on employee activity in Concur.
 - e. Receives Emails – allows delegate to see email notifications that the user receives.
 - f. Can Approve – if you are an approver (supervisor/budget approver) this allows the delegate to approve on the user’s behalf.
 - g. Can Approve Temporary – best used if approver is out of office without access to Concur.
 - h. Can Preview for Approver – allows delegate to see reports but not approve (read-only).
 - i. Receives Approval Emails – allows delegate to receive email notifications about reports pending user approval.

- Once all desired choices have been selected, click Save.
- Users can also be deleted from this section by clicking the check box next to their name and clicking Delete.

<input type="checkbox"/> Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/> Patton, Allison APATTON@clemsn.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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"/> Pigeon, John JPIGEON@clemsn.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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"/> Tonkin, Jennifer JTONKIN@clemsn.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

***Note:** Can Submit Reports and Can Submit Requests are not available in Concur. The user **MUST** submit the report themselves; this action cannot be delegated.