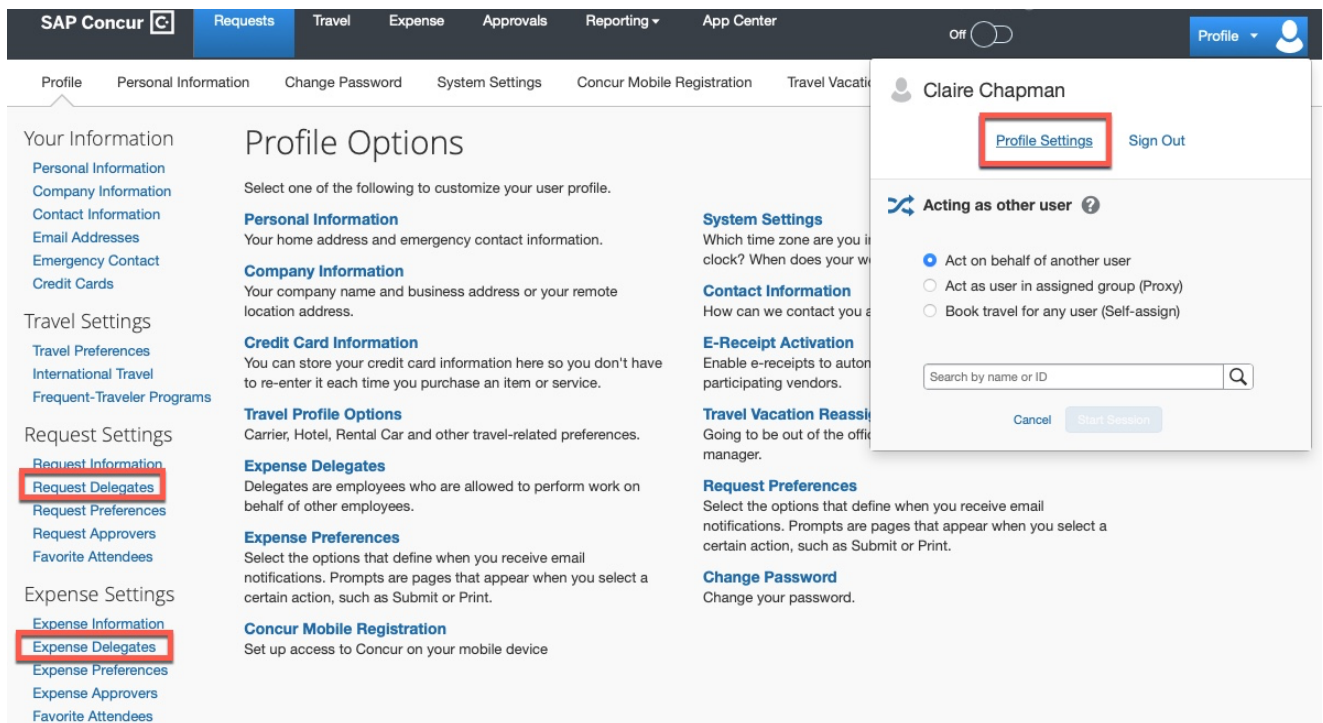# Add or Remove Request/Expense Delegates

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.

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

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

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.

2. Once all desired choices have been selected, click Save.

3. Users can also be deleted from this section by clicking the check box next to their name and clicking Delete.

	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
☐	**Patton, Allison** APATTON@clemson.edu	☐	☐	☐	☐	☐	☐	☐	☐	☐ 📅 📅	☐	☐
☐	**Pigeon, John** JPIGEON@clemson.edu	☐	☐	☐	☐	☐	☐	☐	☐	☐ 📅 📅	☐	☐
☐	**Tonkin, Jennifer** JTONKIN@clemson.edu	☑	☑	☐	☐	☑	☑	☑	☑	☐ 📅 📅	☐	☑

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