

# Adding a Delegate in Concur

To add a delegate:

Click on your Profile  and select Profile Settings

Select either Request Delegates or Expense Delegates (or you can do both separately).

**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

**Expense Settings**

- Expense Information
- Expense Delegates**
- Expense Preferences
- Expense Approvers
- Personal Car
- Favorite Attendees

**Profile Options**

Select one of the following to customize your user profile.

**Personal Information**  
Your home address and emergency contact information.

**Company Information**  
Your company name and business address or your remote location address.

**Credit Card Information**  
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

**E-Receipt Activation**  
Enable e-receipts to automatically receive electronic receipts from participating vendors.

**Expense Delegates**  
Delegates are employees who are allowed to perform work on behalf of other employees.

**Expense Preferences**  
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

**Concur Mobile Registration**  
Set up access to Concur on your mobile device.

**System Settings**  
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

**Contact Information**  
How can we contact you about your travel arrangements?

**Setup Travel Assistants**  
You can allow other people within your companies to book trips and enter expenses for you.

**Travel Profile Options**  
Carrier, Hotel, Rental Car and other travel-related preferences.

**Request Preferences**  
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

**Personal Car**  
Personal Car

A new window will open.

1. Select Add,
2. Search by employee name or email address. Type at least the first three letters of the employee's name/email.
3. The select add.
4. Select the available boxes that list processes that you want to delegate to the employee.
5. Select save.

**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.

Name  Can Prepare  Can View Receipts  Can Use Reporting  Receives Emails  Can Approve  Can Approve Temporary  Can Preview For Approver  Receives Approval Emails

**Expense Delegates**

Delegates | Delegate For

**Add** **Save** **Delete**

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