Using Delegates

A traveler may assign a delegate to create their travel request and expense reports for them. They may also have the delegate view receipts and receive emails on their behalf. The permissions provided to the delegate depend on how the traveler sets up their profile; delegates may have fewer permissions than the traveler. **It is the traveler’s ultimate responsibility to submit these requests and reports.** The delegate does not have permission to submit requests or expense reports on behalf of the traveler.

Selecting A Delegate

Select Profile and then Profile Settings
Click Expense or Request Delegates.
Click Add and then a search bar will appear. You can look up by last name, email address, employee id or login. Once you have the delegate selected then Click Add.

Note: The traveler will need to complete this delegate set-up process for both travel request and expense reporting activities. A person who seeks to assist a traveler without having been set up as a delegate in advance by the traveler will not be able to create transactions in Concur.
Click Delegate to see which travelers have given permission to delegate on their behalf.
Delegate Role

To **assume the Delegate role** (after the traveler has created your delegate role) you must also create a connection to your traveler within Concur.

It is a 2-way process!

To do that, **Click on Profile**, and then select under **Act As** select **A Delegate for another Traveler who has granted you this permission**.

The delegate can type in the last name of the traveler they are a delegate for, or they can use the drop-down arrow and will be given a list of Travelers they have been given permissions to delegate for and select from the list. Then **Click Switch**.
The page will change and at the top where profile was you will see **Acting As** and the **Traveler** you are delegating for.

To return to acting as yourself (not as a delegate), or to become the delegate of a different Traveler simply **Click Acting As** and a box will pop up. Select **Myself** or **A Delegate** for **Traveler who has granted you this permission**.

Then **Click** Switch.