

Assign a Delegate in Concur

A Delegate (Travel Preparer) can be assigned in the Concur System to do the following:

- Prepare your expense reports
- View your receipts
- Receive copies of your email notifications from the system
- A Delegate **CANNOT** submit for the employee

How To Assign Your Delegates:

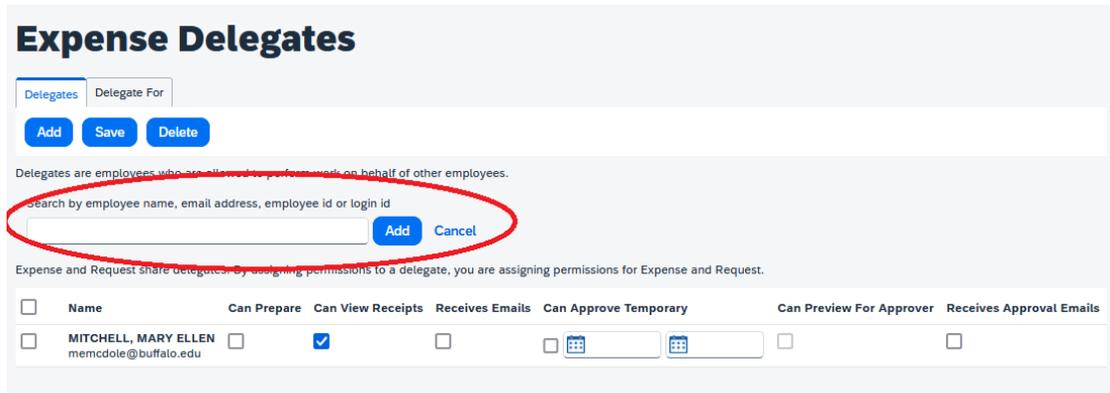
- At the top of your home page, click the **Person Icon** then click **Profile Settings**.
- In your profile Expense Settings, click **Expense Delegates**



<p>Request Settings</p> <ul style="list-style-type: none"> Request Information Request Delegates Request Preferences Request Approvers Favorite Attendees <p>Expense Settings</p> <ul style="list-style-type: none"> Expense Information Expense Delegates Expense Preferences Expense Approvers Favorite Attendees Expense Credit Cards <p>Other Settings</p> <ul style="list-style-type: none"> E-Receipt Activation System Settings Concur Connect Travel Vacation Reassignment Concur Mobile Registration 	<p>Profile Options</p> <p>Select one of the following to customize your user profile.</p> <p>Personal Information Your home address and emergency contact information.</p> <p>Company Information Your company name and business address or your remote location address.</p> <p>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.</p> <p>E-Receipt Activation Enable e-receipts to automatically receive electronic receipts from participating vendors.</p> <p>Travel Vacation Reassignment Going to be out of the office? Configure your backup travel manager.</p> <p>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.</p> <p>Concur Mobile Registration Set up access to Concur on your mobile device</p>	<p>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?</p> <p>Contact Information How can we contact you about your travel arrangements?</p> <p>Setup Travel Assistants You can allow other people within your companies to book trips and enter expenses for you.</p> <p>Travel Profile Options Carrier, Hotel, Rental Car and other travel-related preferences.</p> <p>Expense Delegates Delegates are employees who are allowed to perform work on behalf of other employees.</p> <p>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.</p>
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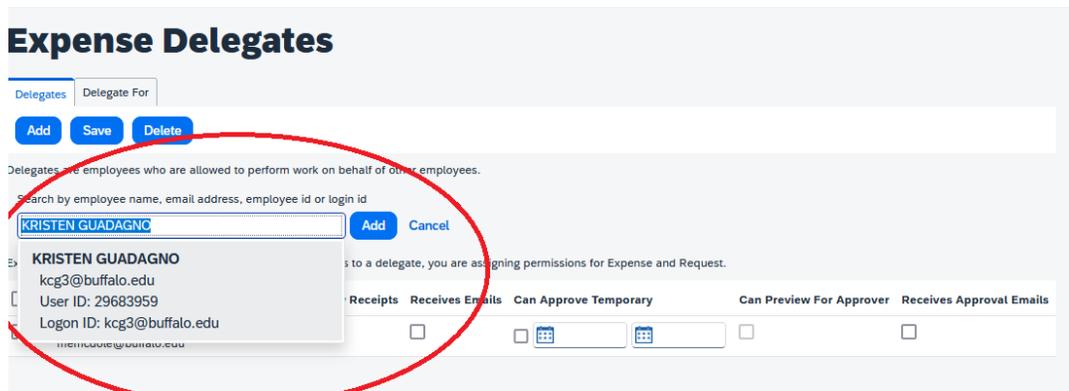
Please Note: *Request* and *Expense* Settings share the same delegates. Adding a delegate to either setting gives them permission to work in both the *Request* and *Expense* Modes.

- Click **Add** and a search bar will appear



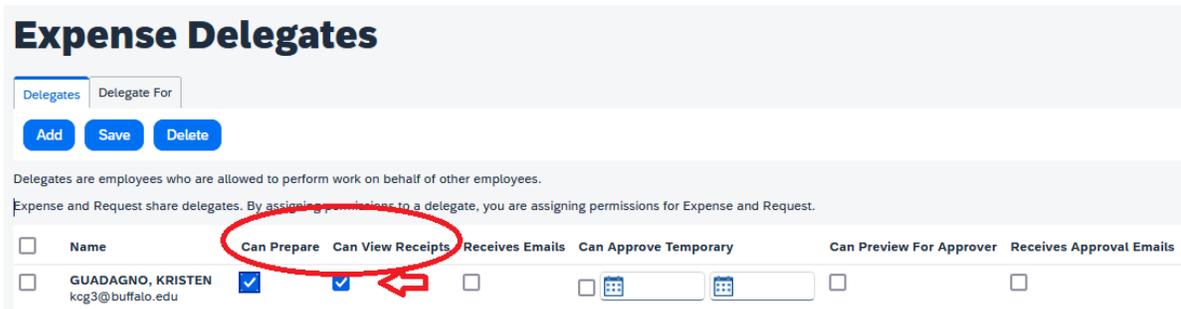
- Please assign the following Reimbursement & Procurement Specialists:

- Donna Grant (dmgrant3)
- Kristen Guadagno (kcg3)
- Madeline Milroy (mam45)
- Teresa Olverd (teresaol)



- Select the person when they appear in the list.

- **Check off only the following boxes** to make our team members delegates.
 - **Can Prepare**-allow the delegate to prepare your expense reports
 - **Can View Receipts**-allow the delegate to view and attach your receipts

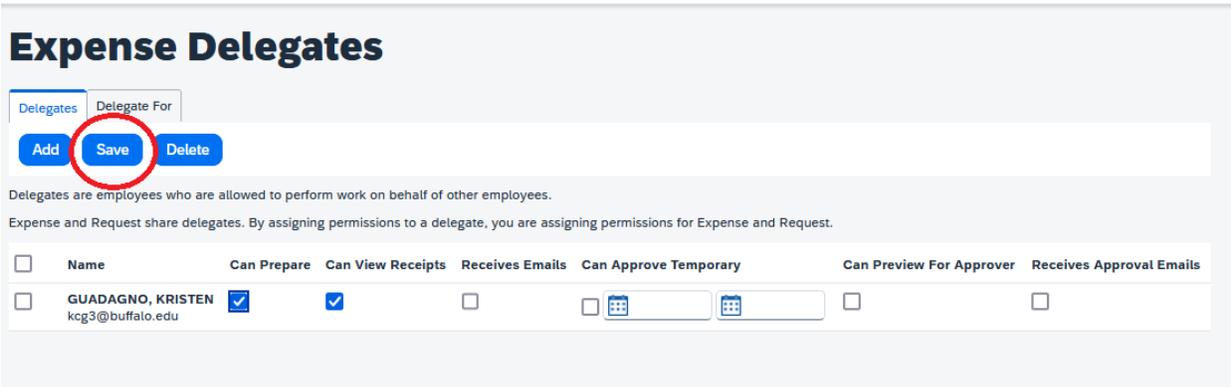


Expense Delegates

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 View Receipts	Receives Emails	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	GUADAGNO, KRISTEN kcg3@buffalo.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- When finished, please make sure you click **Save**



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<input type="checkbox"/>	GUADAGNO, KRISTEN kcg3@buffalo.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Revision Log:

3/5/25	Added updated screenshots and made directions more concise