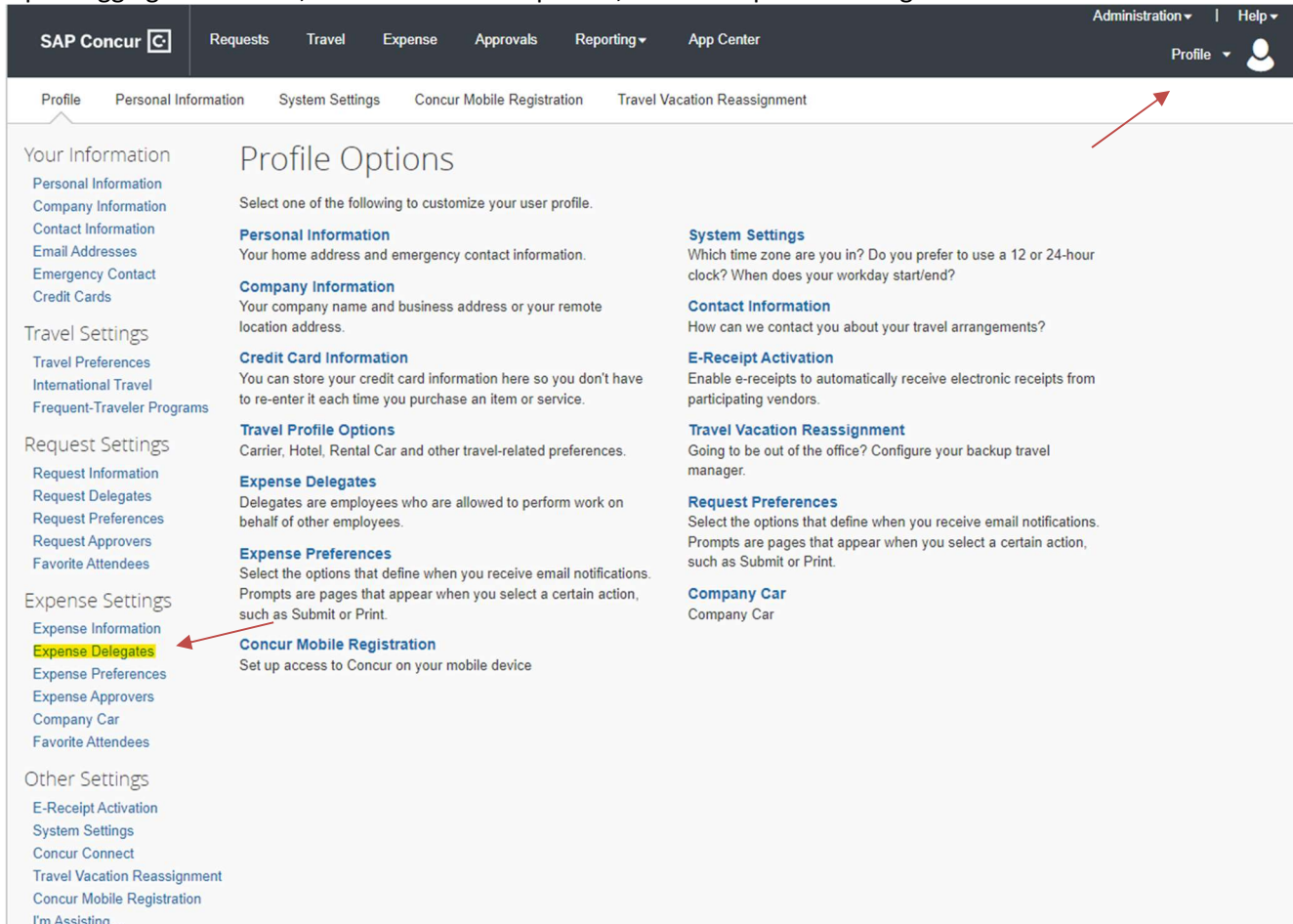


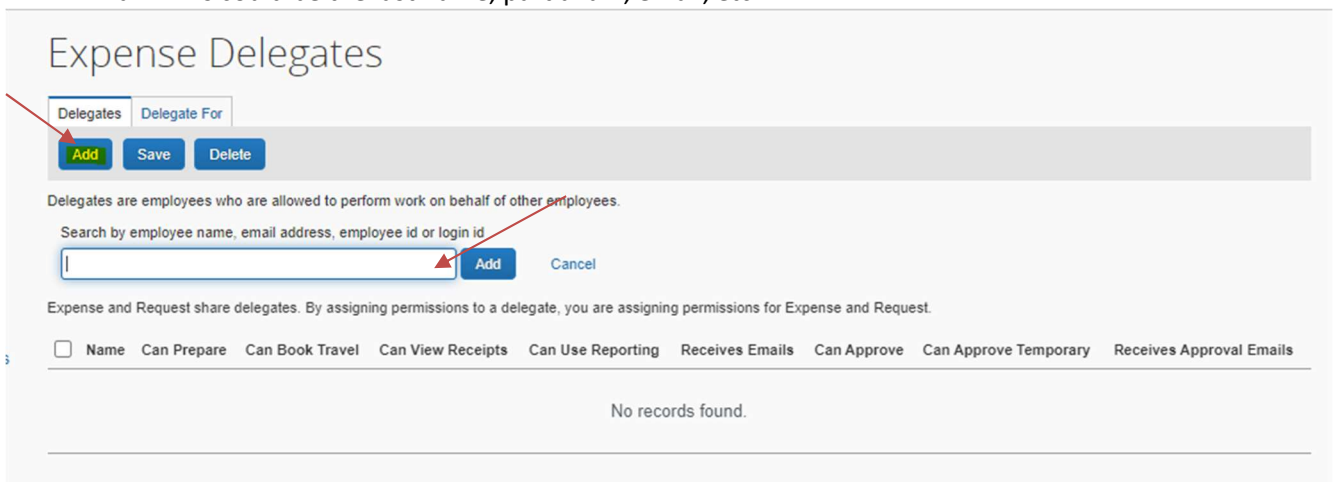
# Concur-How to Set Up an Expense Delegate

- 1) Upon logging into Concur, click the Profile dropdown, and select profile settings.



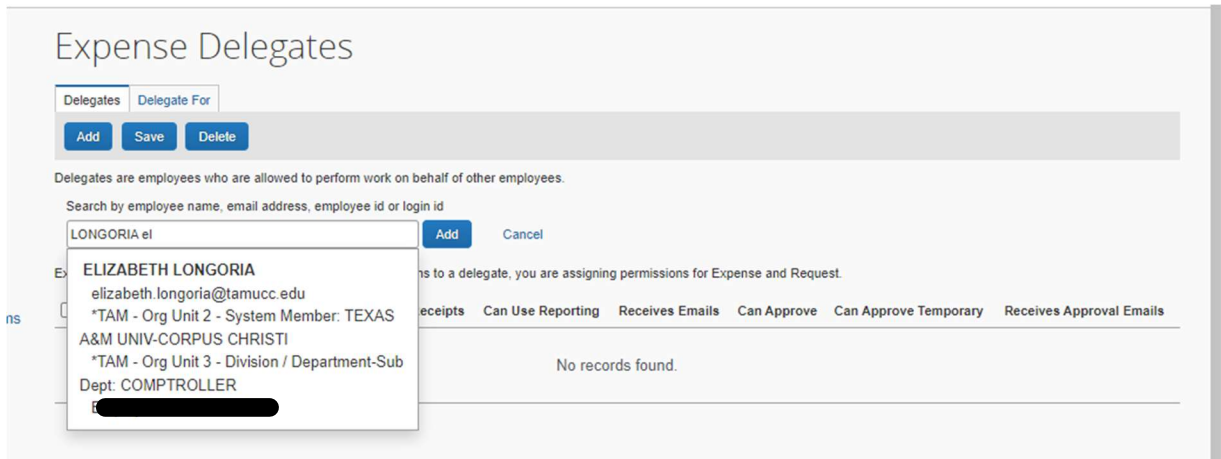
The screenshot shows the SAP Concur user interface. At the top, there is a navigation bar with 'SAP Concur' logo and tabs for 'Requests', 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. On the right, there are links for 'Administration' and 'Help', and a 'Profile' dropdown menu with a user icon. Below the navigation bar, there is a sub-navigation bar with 'Profile', 'Personal Information', 'System Settings', 'Concur Mobile Registration', and 'Travel Vacation Reassignment'. The main content area is titled 'Profile Options' and contains several sections: 'Your Information' (Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, Credit Cards), 'Travel Settings' (Travel Preferences, International Travel, Frequent-Traveler Programs), 'Request Settings' (Request Information, Request Delegates, Request Preferences, Request Approvers, Favorite Attendees), 'Expense Settings' (Expense Information, Expense Delegates, Expense Preferences, Expense Approvers, Company Car, Favorite Attendees), and 'Other Settings' (E-Receipt Activation, System Settings, Concur Connect, Travel Vacation Reassignment, Concur Mobile Registration, I'm Assisting...). A red arrow points to the 'Profile' dropdown menu in the top right corner. Another red arrow points to the 'Expense Delegates' link in the 'Expense Settings' section.

- 2) Click Expense Delegates
- 3) Click Add
- 4) Type in your search.
  - a. This could be the last name, partial uin, email, etc.

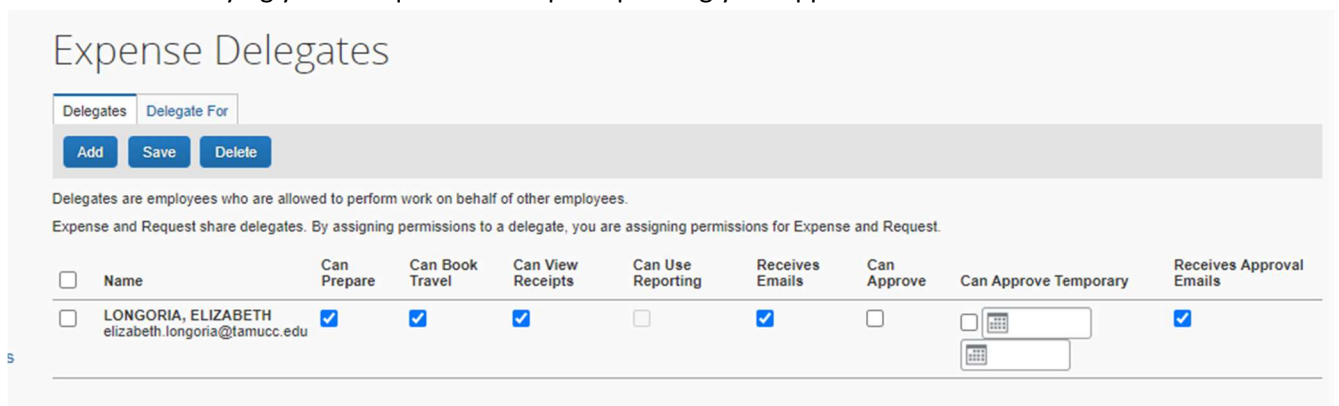


The screenshot shows the 'Expense Delegates' search interface. At the top, there is a title 'Expense Delegates' and two tabs: 'Delegates' and 'Delegate For'. Below the tabs, there are three buttons: 'Add', 'Save', and 'Delete'. A red arrow points to the 'Add' button. Below the buttons, there is a text description: 'Delegates are employees who are allowed to perform work on behalf of other employees.' Below this, there is a search bar with the placeholder text 'Search by employee name, email address, employee id or login id'. A red arrow points to the search bar. To the right of the search bar, there are two buttons: 'Add' and 'Cancel'. Below the search bar, there is a text description: 'Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.' Below this, there is a table with columns: 'Name', 'Can Prepare', 'Can Book Travel', 'Can View Receipts', 'Can Use Reporting', 'Receives Emails', 'Can Approve', 'Can Approve Temporary', and 'Receives Approval Emails'. Below the table, there is a text description: 'No records found.'

- 5) The list of options will filter based on your search parameters
- 6) Choose the appropriate user from the list.



- 7) If it doesn't automatically add the user to your list, click the add button next to the search field
- 8) Assign the permissions you wish to give this delegate
  - a. Can Prepare-This user may prepare expense reports on your behalf. You will still be required to submit the report
  - b. Can Book Travel – This user may prepare travel arrangements on your behalf. You will still be required to submit the expenses/report.
  - c. Can View Receipts-Should check by default when selecting Can Prepare. This allows this user to view your receipt store, ereceipts, receipts images, etc.
  - d. Can Use Reporting-If you have any reporting rights (typically restricted to dept heads) you may assign that reporting license to 2 individuals
  - e. Receives Emails-This user will be copied by all emails generated by Concur addressed to you
  - f. Can Approve-You are sharing your ability to approve reports with this user. **This access cannot be shared without approval from Card Services.**
  - g. Can Approve Temporary-This is a date range. You are giving this user temporary access to approve reports and requests on your behalf. **This access cannot be shared without approval from Card Services.**
  - h. Receives Approval Emails-This user will be copied on all emails generated by Concur notifying you of requests and reports pending your approval



- 9) Click Save
- 10) Once you have clicked save, the next time your delegates logs into Concur, they will be able to delegate into your profile to perform the functions you have given them permission to perform.