

# Adding a Delegate

From your Expense profile, you can add delegates to your profile. Those who you assign as your delegates can prepare expense reports on your behalf.

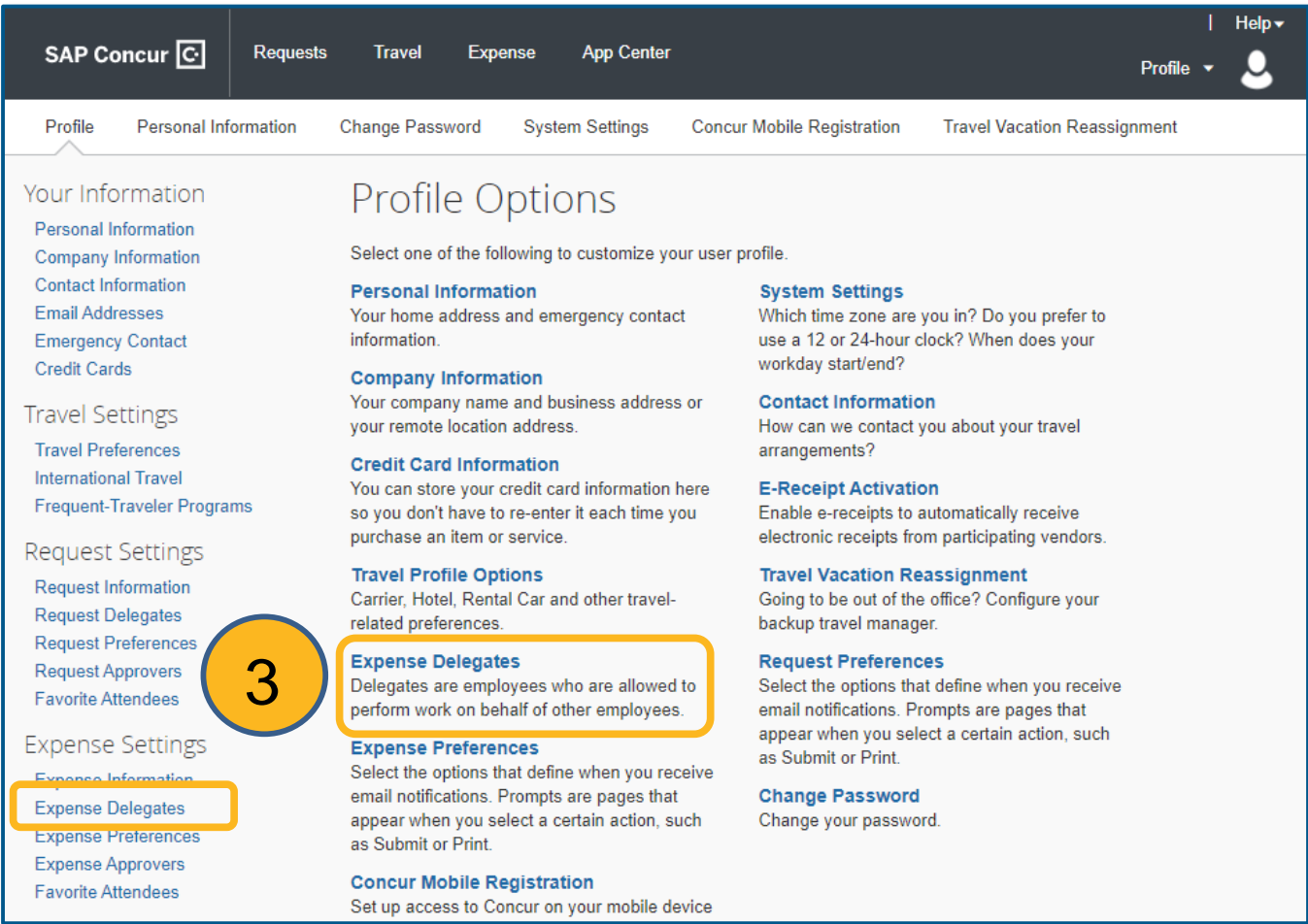
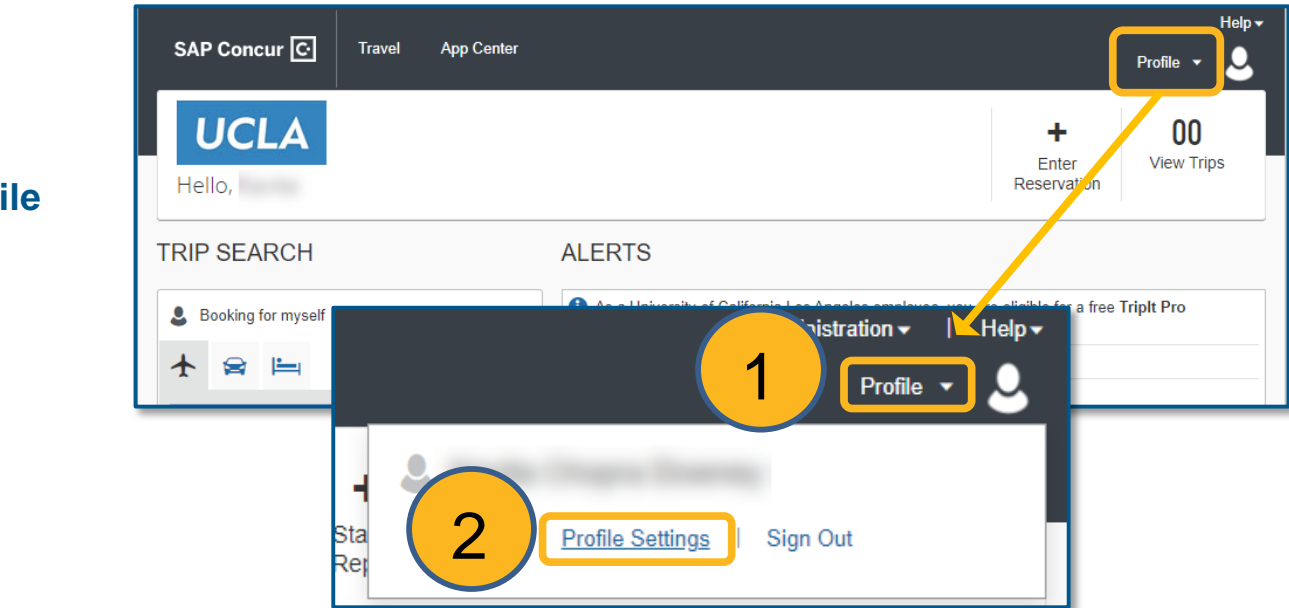
Watch  the tutorial.

Please note that although delegates can prepare reports for others, per the Certification of Travel Expenses section in [UC Policy G-28](#) (p 42) , each employee must review and submit his or her own reports for approval.

1) From the home page, click **Profile**

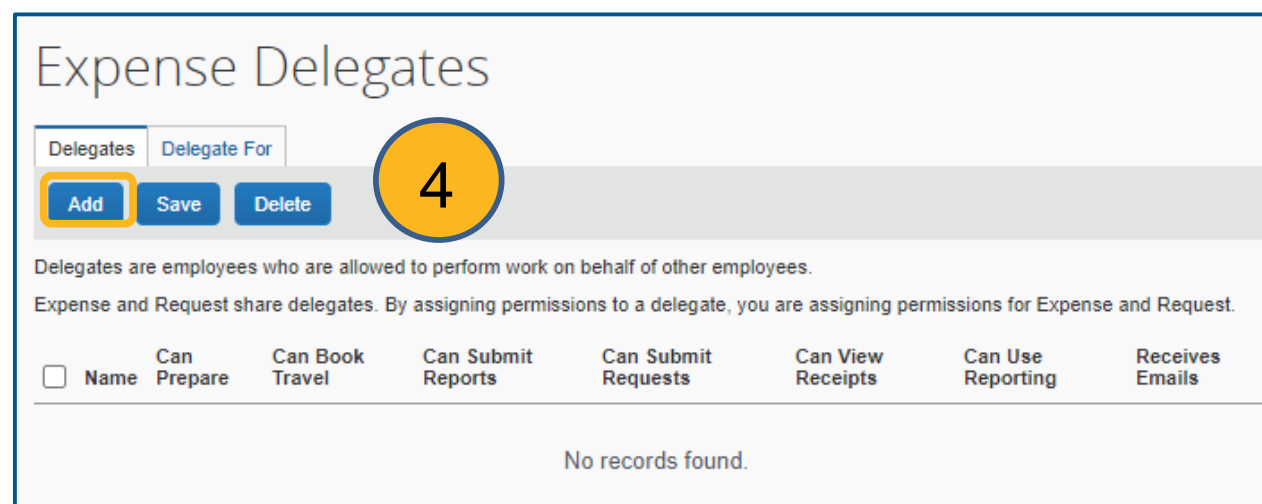
2) Click **Profile Settings**.

3) Click **Expense Delegates** in the left column or under **Profile Options**



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4) Click **Add**



Expense Delegates

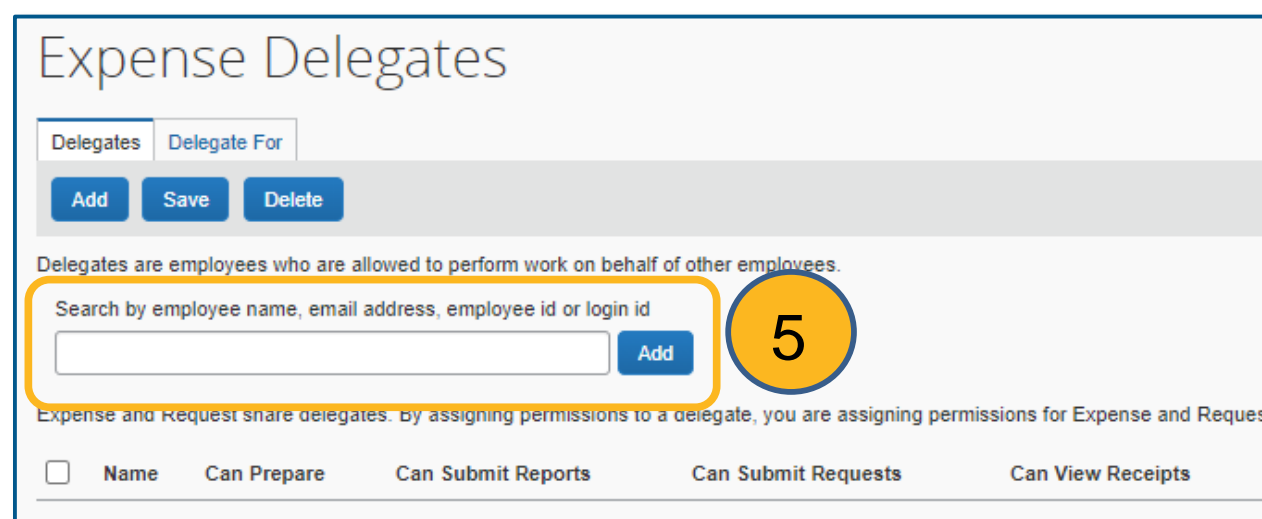
Delegates Delegate For

**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.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails
No records found.								

5) Search for and select the employee(s) you want to add by finding their name and clicking on it



Expense Delegates

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Search by employee name, email address, employee id or login id

 **Add**

<input type="checkbox"/>	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts
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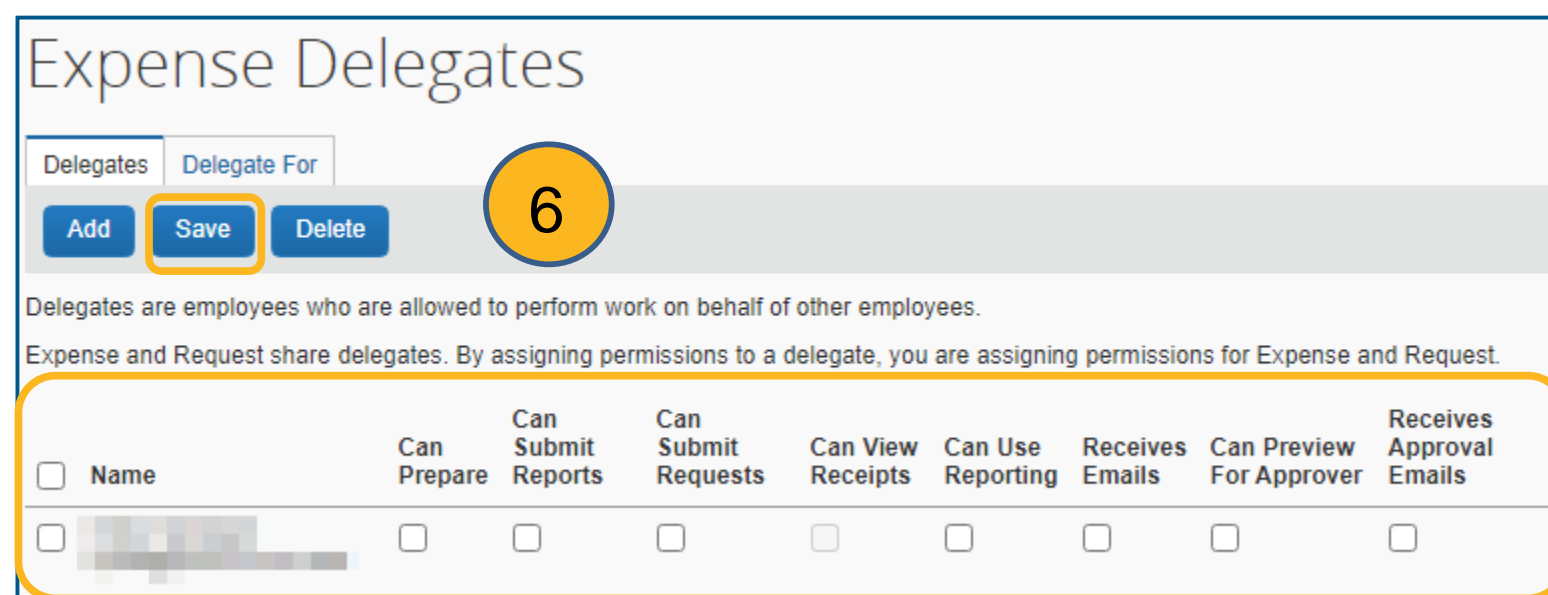
6) Using the checkboxes, specify which tasks you want the delegate to perform on your behalf.

Typically, users select **all of the check boxes** for delegates they wish to allow to prepare reports on their behalf.

(Only Approvers will have the **Can Preview for Approver** and **Receives Approval Emails** checkboxes)

Click **Save**

Note: Although delegates can prepare reports for submission, the user will need to submit his or her own reports. To enable the delegate to prepare reports and get them ready for submission, make sure the **Can Prepare** and **Can Submit Reports** boxes are checked.



Expense Delegates

Delegates Delegate For

**Add** **Save** Delete

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<input type="checkbox"/>	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	[blurred]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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## Delegate Profile Definitions

<b>Can Prepare:</b>	Delegate can prepare expense reports on your behalf. You will still be required to submit the report.
<b>Can View Receipts:</b>	Should auto-check when selecting <i>Can Prepare</i> . This allows the delegate to view your receipt store (e-receipts, receipts images, etc.).
<b>Can Submit Reports:</b>	The delegate can click the <i>Submit Report</i> button but will receive a red warning stating the Report must be submitted by the employee. However, by allowing the delegate to click the <i>Submit Report</i> button, the Report is run through a validation process to see if there are any additional errors that require correction before <b>you</b> can submit the report. Additionally, clicking <i>Submit Report</i> triggers an email sent overnight, notifying you a report has been created and it ready for you to review and submit.
<b>Can Submit Requests:</b>	The delegate can both create and submit a Request for you.
<b>Can Use Reporting:</b>	If you have any reporting rights (typically restricted to Supervisors and/or Org Leaders) you may assign that reporting license to 2 individuals.
<b>Receives Emails:</b>	The delegate will be copied on <u>all</u> emails generated by Concur addressed to you.
<b>Can Preview for Approver:</b>	The delegate can <i>view</i> reports pending your approval. The only action the previewer can do is, notify the approver the report was reviewed and ready for approval by you or return a report to an employee for correction.
<b>Receives Approval Emails:</b>	The delegate user will be copied on <u>all</u> emails generated by Concur notifying you of requests and reports pending your approval.