

1. Overview

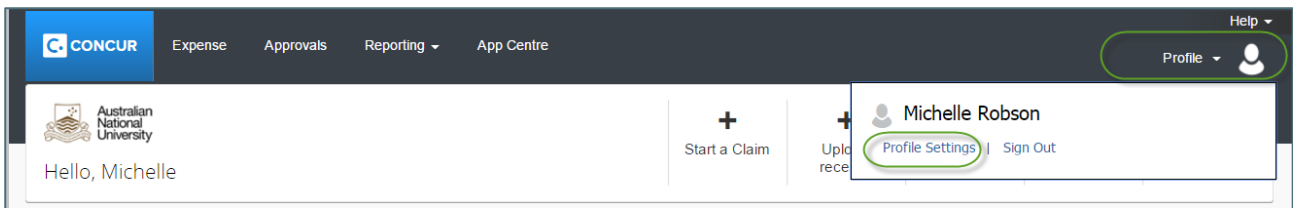
In Concur, a Delegate is someone who is authorized to process and/or approve Expense Claims on behalf of another user. Some important points about Delegates:

- Delegates can prepare, but not approve the same expense claim.
- Delegates cannot complete an online Missing Receipts Declaration on behalf of someone else.

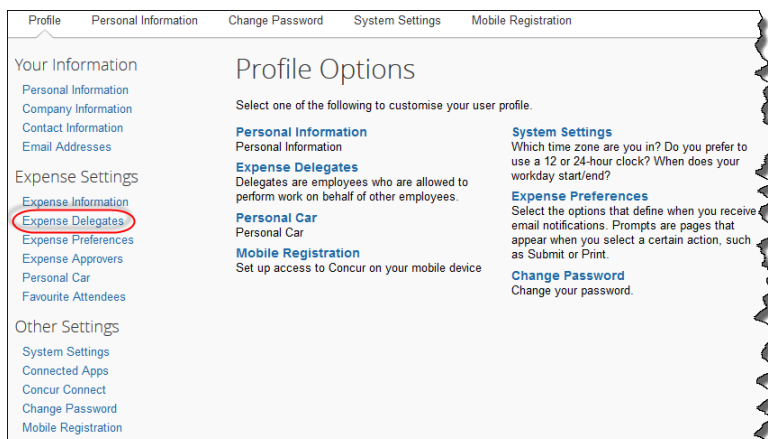
This Guide provides instructions on how to assign a Delegate to prepare or approve expense claims for you.

2. Delegating an Expense Prepare/Submit or Approval User

Go to , then [Profile Settings](#).

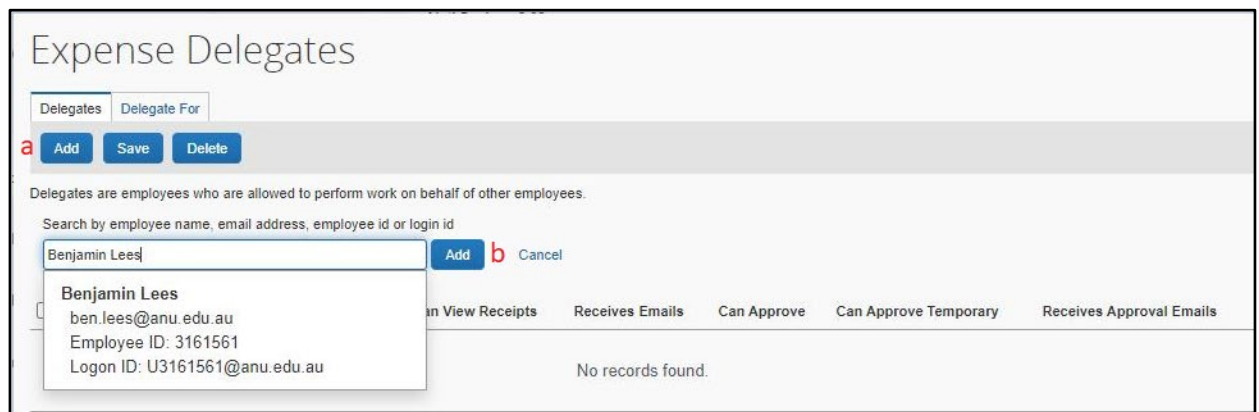


On the Profile Options page, select 'Expense Delegates'





On the Expense Delegates page:

- Click Add. A search bar appears. Enter the name or Employee ID of the person you want to assign as your delegate and choose them from the search list.
- Click the Add button to the right of the search field.



The selected name is added to the Delegates list.

- 2) Select the responsibilities you wish this delegate to perform on your behalf, once complete Click 
- 3) The next time your delegates log into Concur, they will be able to “Act as another user” for your profile to perform the functions you have given them permission to perform
- 4) If the delegate is no longer required, select the delegate on the page and click 

Expense Delegates

Delegates Delegate For

Add
Save
Delete

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

<input type="checkbox"/>	Name	Can Prepare	Can Submit Claims	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
<input type="checkbox"/>	Lees, Ben u3161561@anu.edu.au	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="text" value=""/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Pyke, Dean xU4655852@anu.edu.au	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text" value=""/>	<input type="checkbox"/>
<input type="checkbox"/>	Robson, Michelle ufstrn10@gmail.com	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="text" value="11/05/2017"/> <input type="checkbox"/> <input type="text" value="11/05/2017"/>	<input checked="" type="checkbox"/>

Expense Delegate Rights include:

Function	Description
Can Prepare	Delegate can create, edit and delete expense claims, notify the employee when the claim is ready for submission, modify Expense Preferences.
Can Submit Claims	Delegate can submit Expense Claims for the Employee.
Can View Receipts	Delegate can attach, delete and view receipt images in receipt store.
Receives Emails	Delegate receives all notifications relating to expense claims for the Employee
Can Approve	An Approval Delegate is a user with Approver access that can review and approve expense claims for another Approver at all times.
Can Approve Temporary	Approval delegates can be set up to approve claims for a specified time, for example, to provide coverage for another Approver’s absence.
Receives Approval Emails	If you want your delegate to be copied on approval-related emails you receive from the Concur system, select the Receives Approval Emails checkbox.

3. Additional Information

For additional information and user guides please visit the Concur Expense Management page:

<https://services.anu.edu.au/information-technology/software-systems/concur-expense-management>