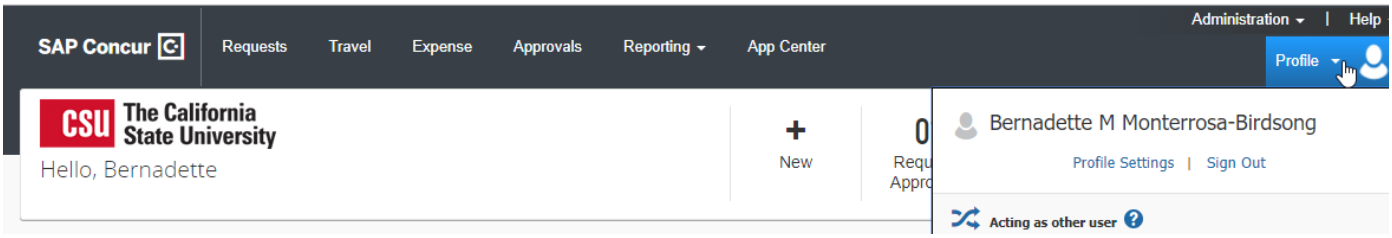
# ASSIGNING DELEGATES IN CONCUR USER GUIDE




LEARN BY DOING

CAL POLY

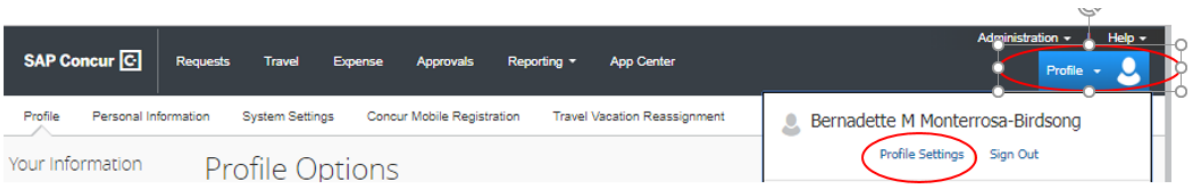
Strategic Business Services

ADMINISTRATION & FINANCE

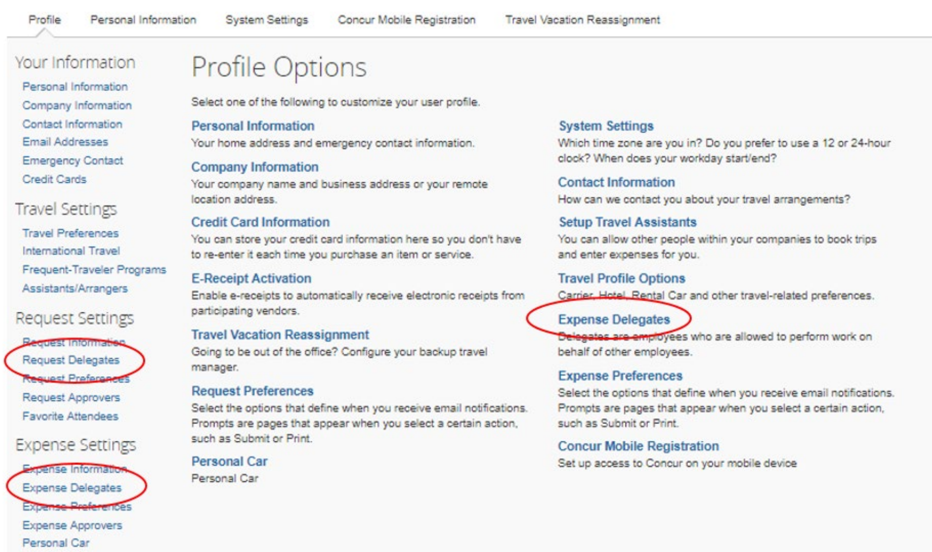
*This guide will show you how to assign a Delegate to:*

- *prepare Request and Expense Reports*
- *review incoming Requests and Expense Reports for approval*
- *receive your emails from the system*
- *pull travel reports on your direct reports*

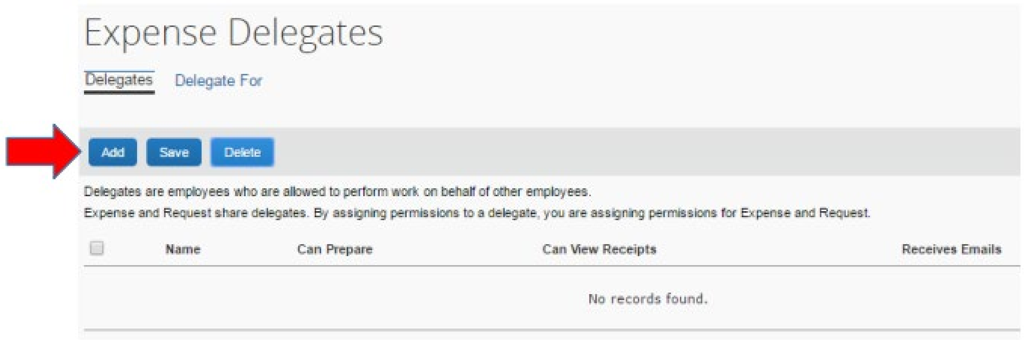
1. Go to your Profile Settings.



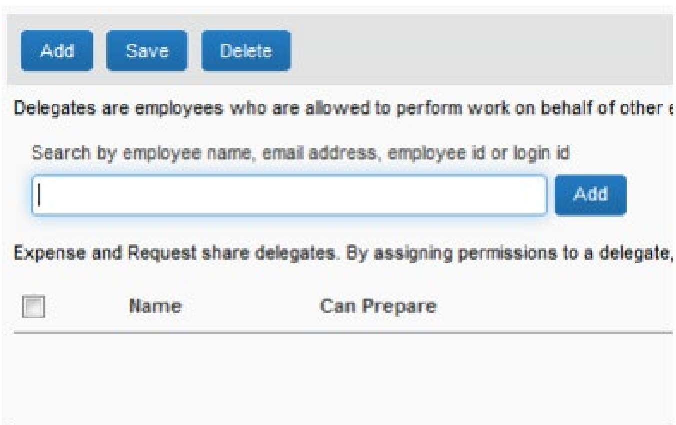

2. Go to **Request Delegate** or **Expense Delegate** (note, what you do in Expense will be reflected in Request, therefore you only have to set up the person once and they will be delegate for both Request and Expense).



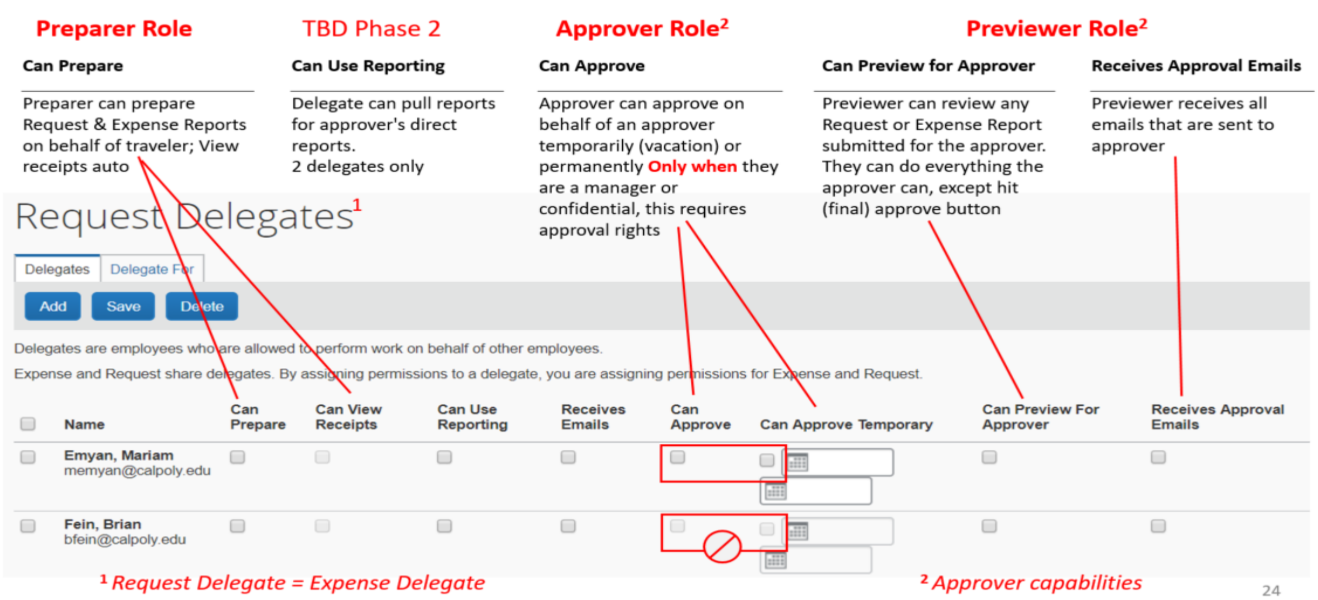
3. In **Expense Delegates**, Click on **Add.**




4. Type a few first letters of the last name of the employee you would like to delegate (the person must have a Concur profile).



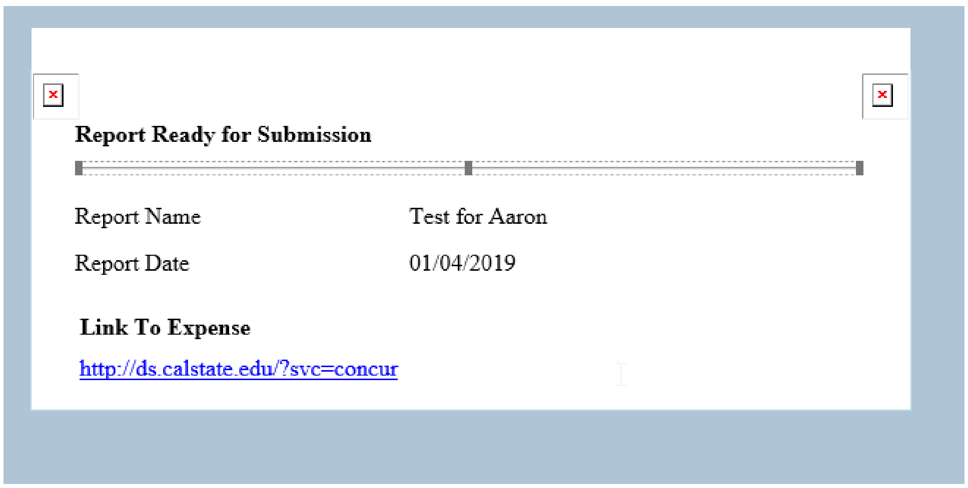

5. Select the permissions you want your delegate to have and then click the **Save** button, next to **Add** button.



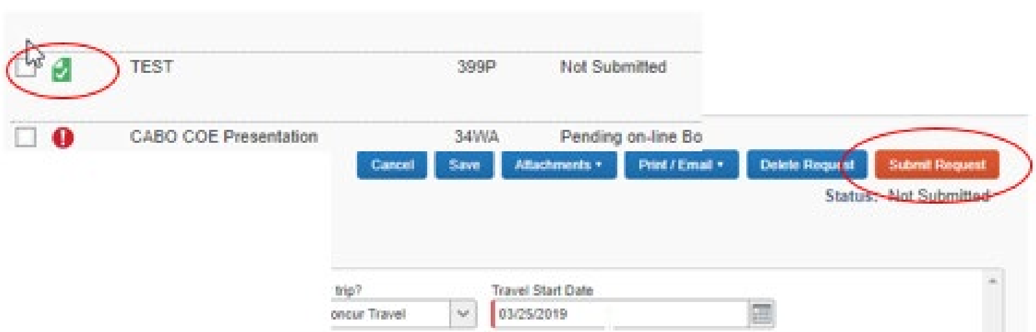
6. Once the employee is selected and the permissions granted, the employee can now act on behalf of the traveler for Request and Expense (see Delegated employee for details).

**AFTER DELEGATE PREPARES A REQUEST AND/OR EXPENSE REPORT, YOU WILL BE NOTIFIED**

1. You will receive an email notification.




2. For **Requests**, go to **Manage Request** queue, click on the icon to see the prepared **Request**. Upon review, click on **Submit**.



3. For **Expense Reports**, go to Active Reports section in **Expense**, click on the **Ready for Review** icon. Upon review, click on **Submit.**