Designating Delegates

These instructions cover how to designate delegates for your Concur account. By providing delegate(s) access to your account in Concur, delegate(s) can prepare reports or requests on your behalf.

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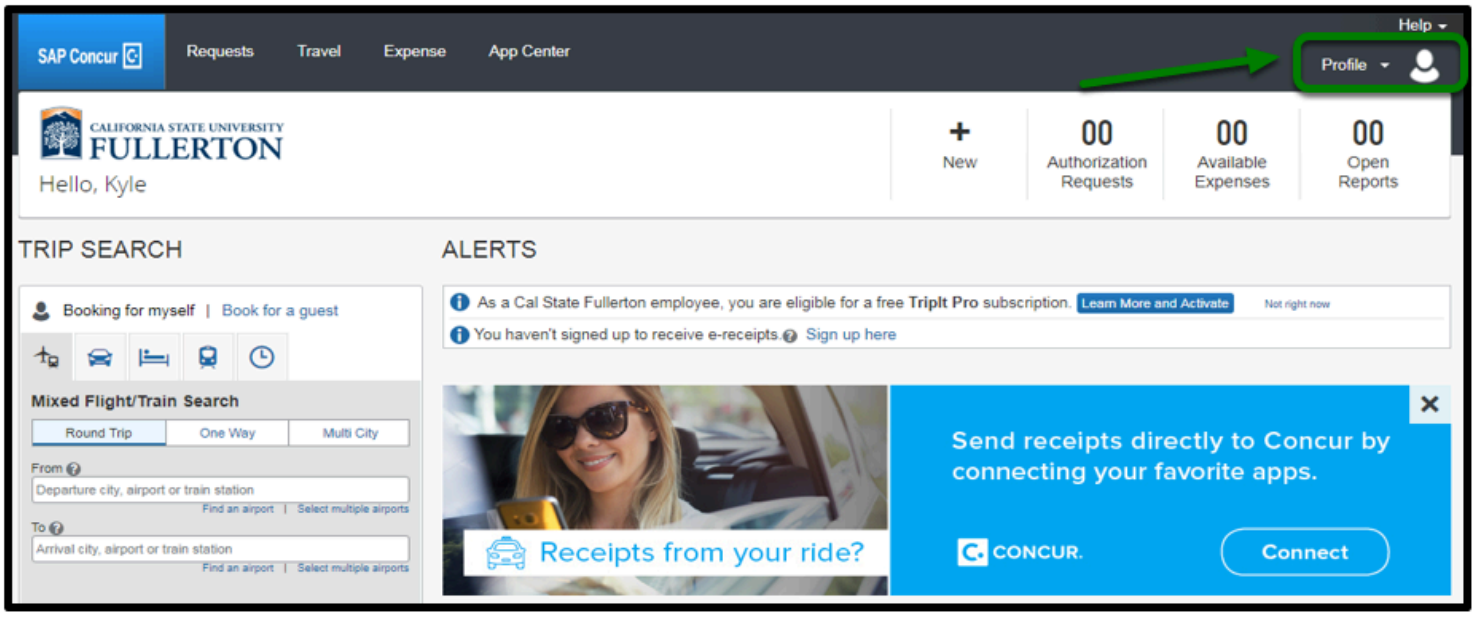
If you need assistance with logging into Concur, please go to Logging into Concur.

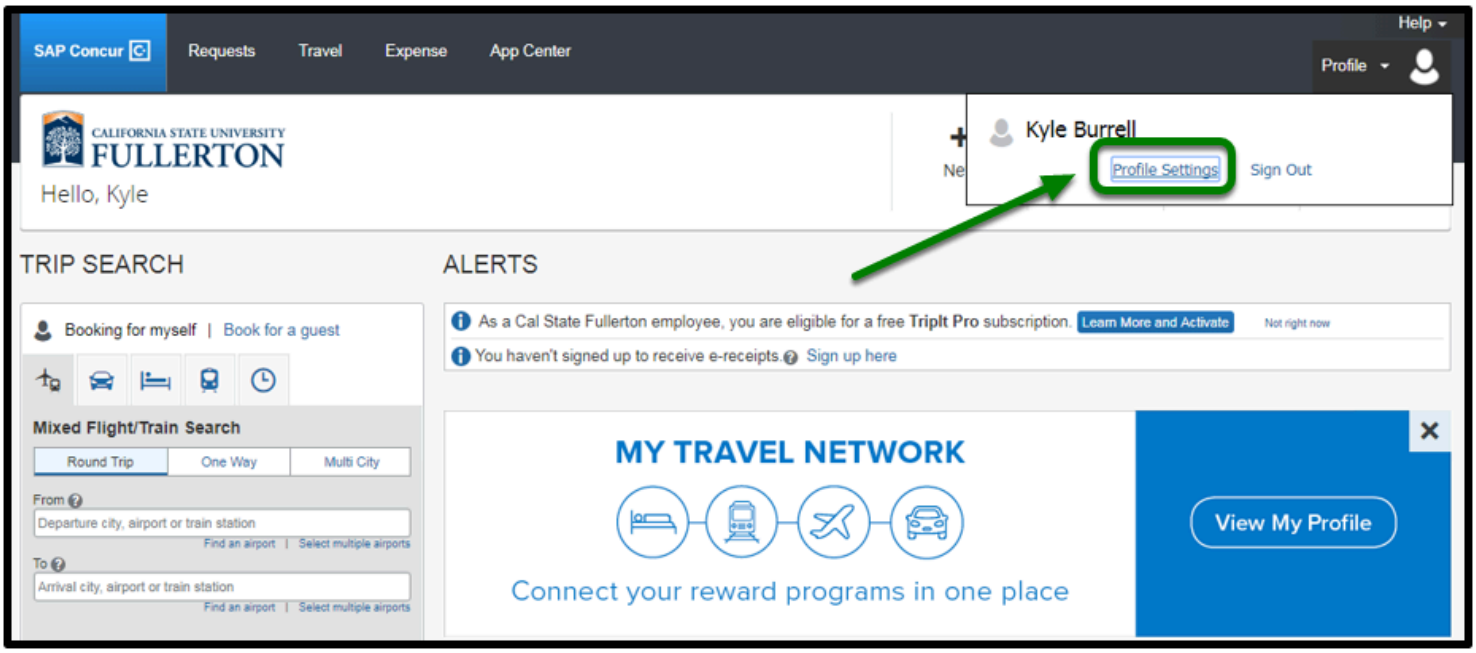
User's View

Adding a Delegate to your Profile

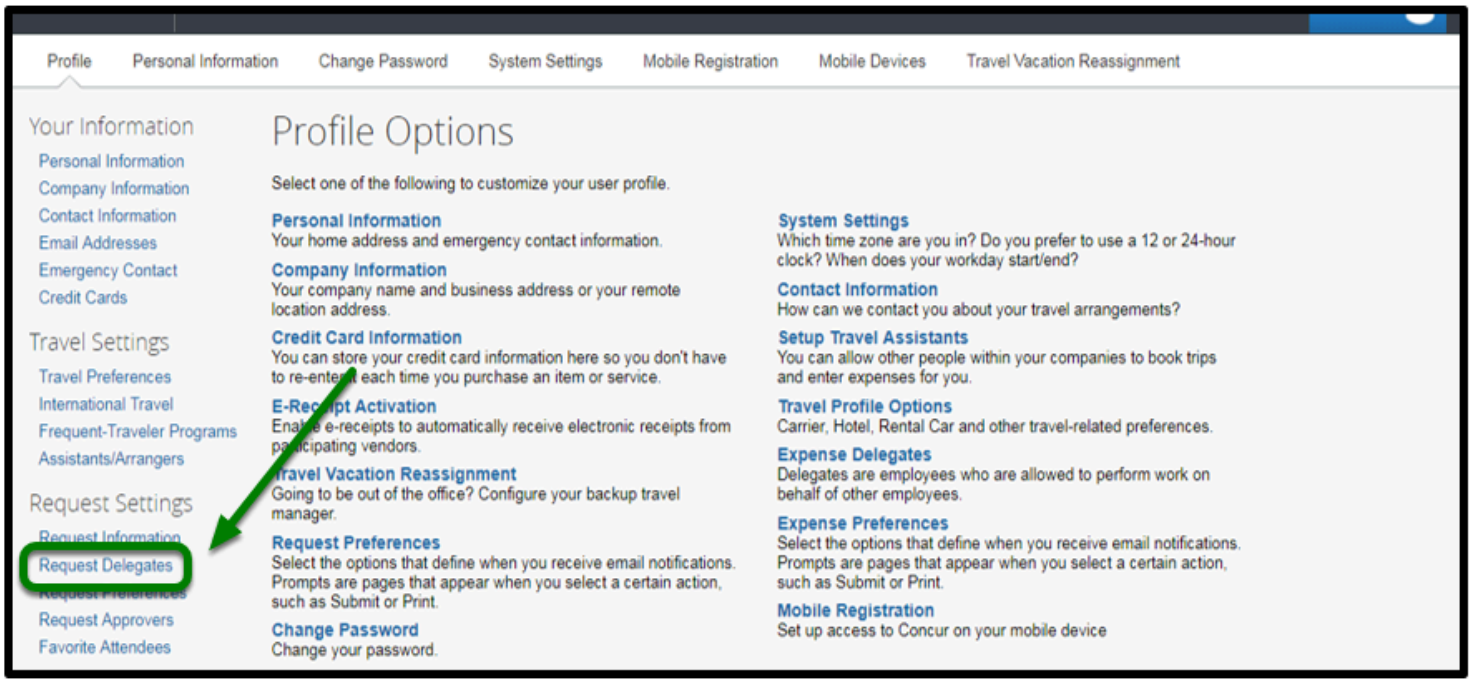
Step 1: Select **Profile** at the top right corner of the web page.



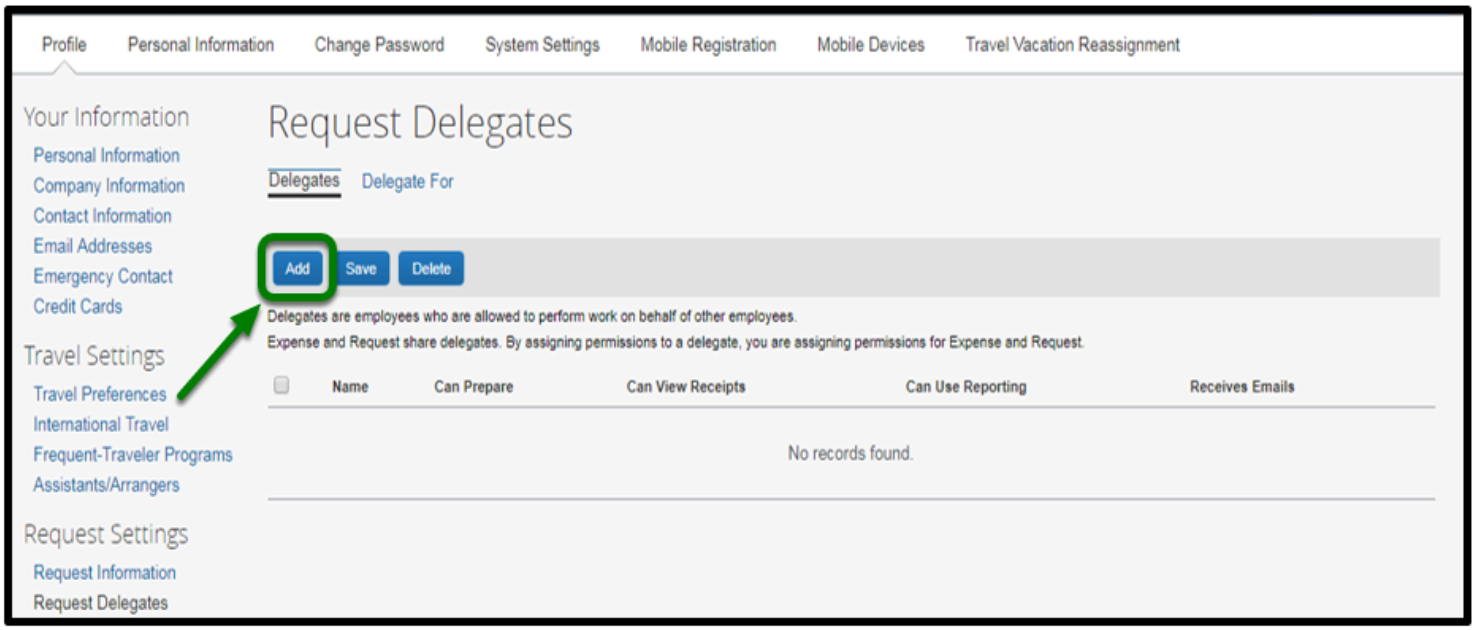
Step 2: Then, click on **Profile Settings**.



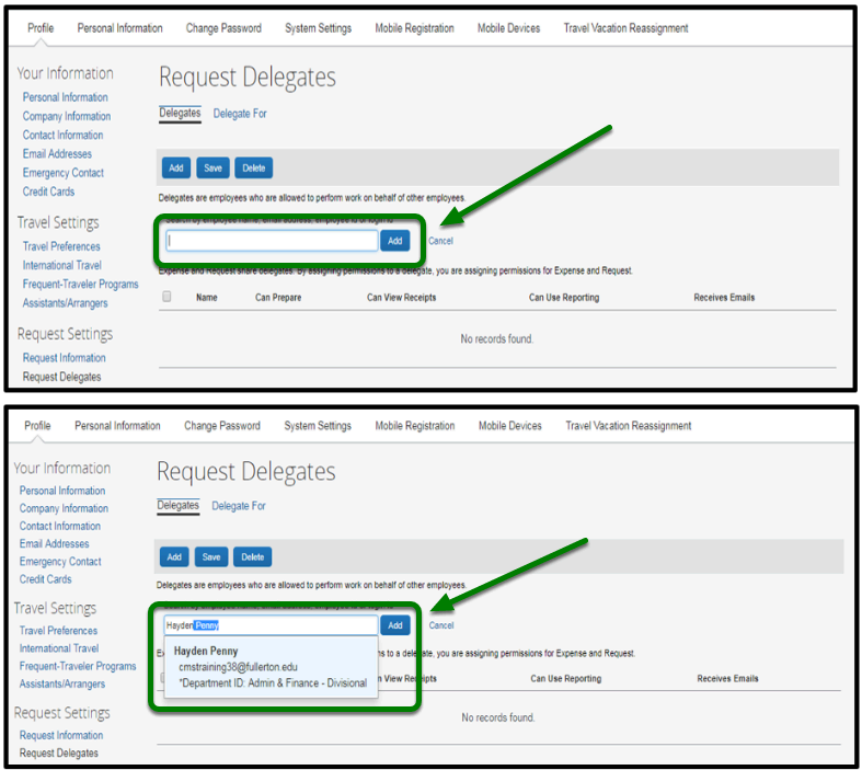
Step 3: Once redirected to your Profile Options, click on **Request Delegates** under Request Settings.



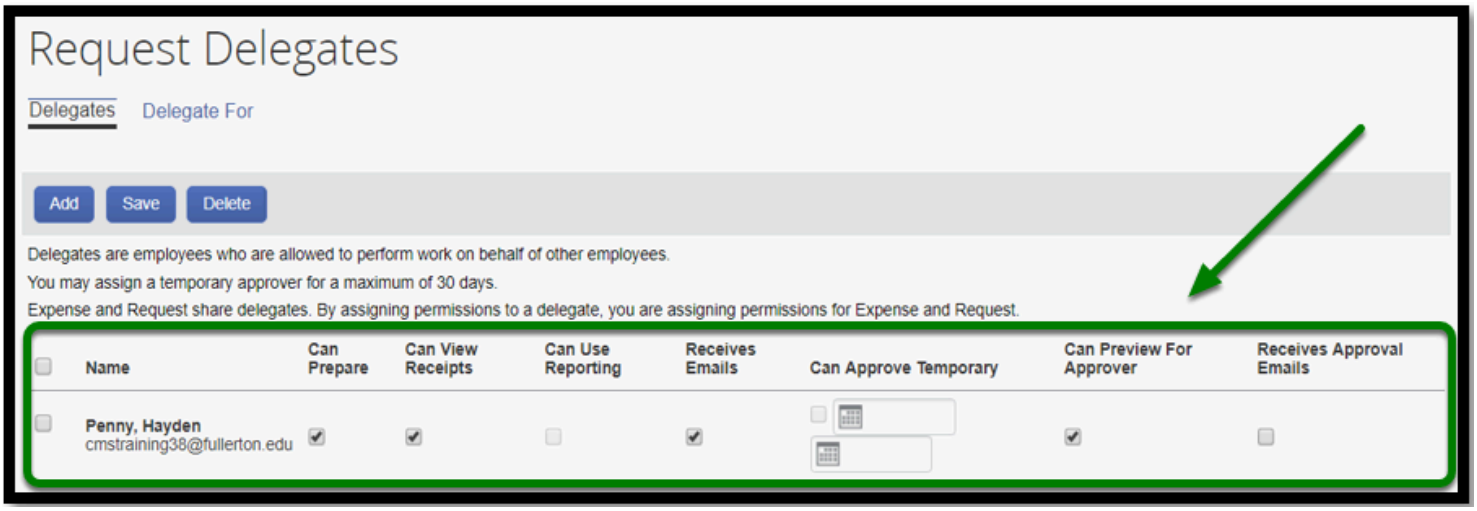
Step 4: You will be taken to the Request Delegates page. Select **Add** to add a delegate.



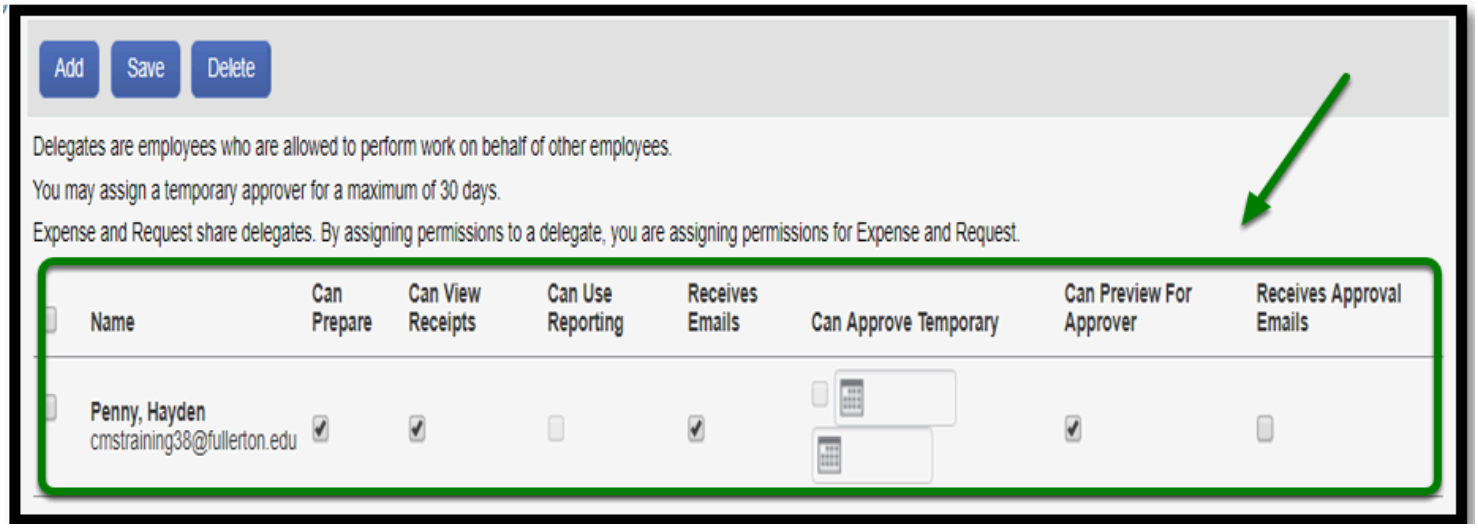
Step 5: A field will open up for you to type in the delegate's name. Enter the delegate's name, and then click on the name in the results, under the drop-down.



Step 6a: Once you click on the name, the delegate's name will automatically save into this row.



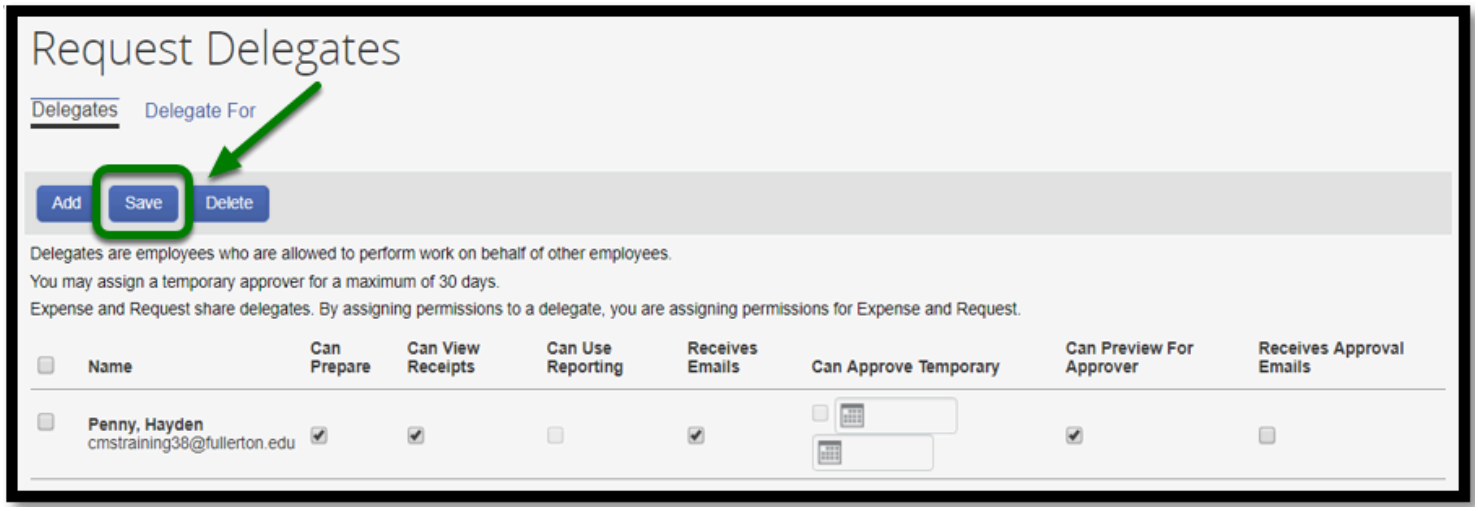
Step 6b: Select the type of access you want the delegate to have. You may designate more than one.



Step 7: Once you've chosen the appropriate access, select **Save**.

You will receive a message with "Your changes have been saved."

⚠ Your delegate does not get automatically notified, as such it is recommended to let your delegate know of their responsibilities.



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6 Types of Access:

Can Prepare

- The delegate can prepare your travel request and expense report on your behalf.

Can View Receipts

- The delegate can view the receipts you've uploaded.

Receives Emails

- The delegate will receive the same emails as you.

Can Approve Temporary

- Another approver can be set-up as a temporary approver for no more than 30 days.

Can Preview for Approver

- The delegate can preview travel requests and expense reports for you.

Receives Approval Emails

- The delegate can receive emails of travel requests and expense reports that have been sent to you for approval.

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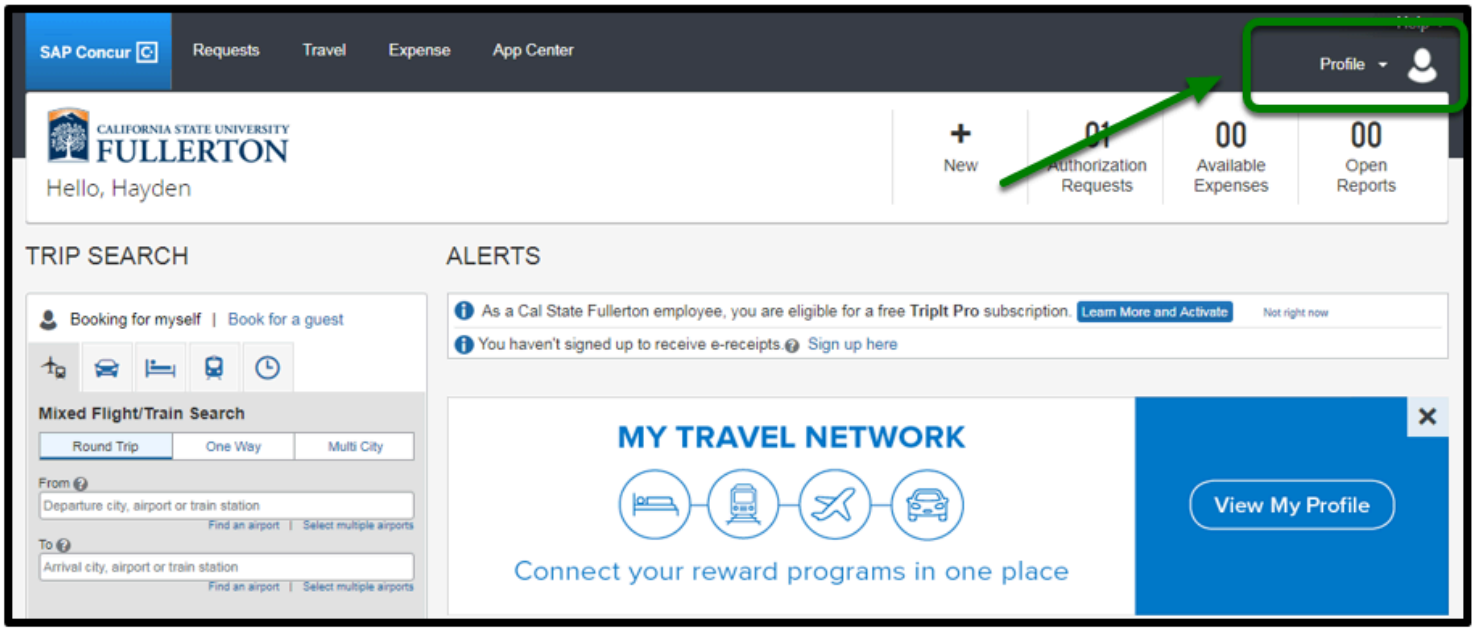
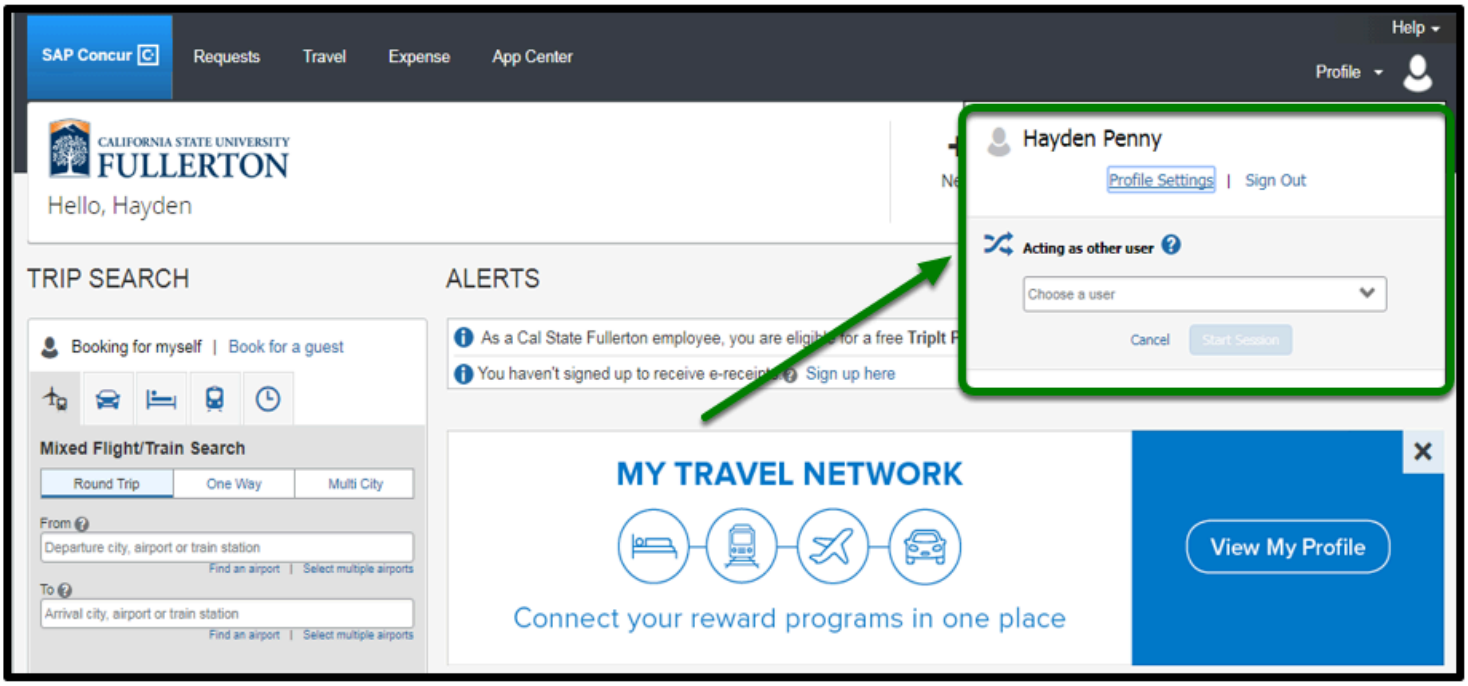
Delegate's View

How to Log In as a Delegate for Another Person

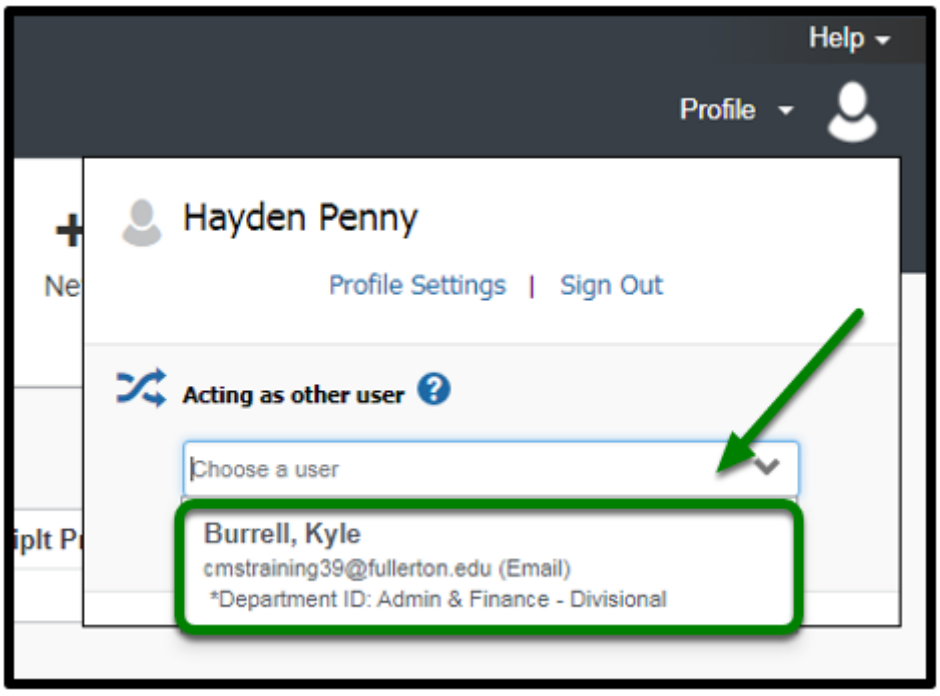
Step 1: Select **Profile** at the top, right corner of the web page.



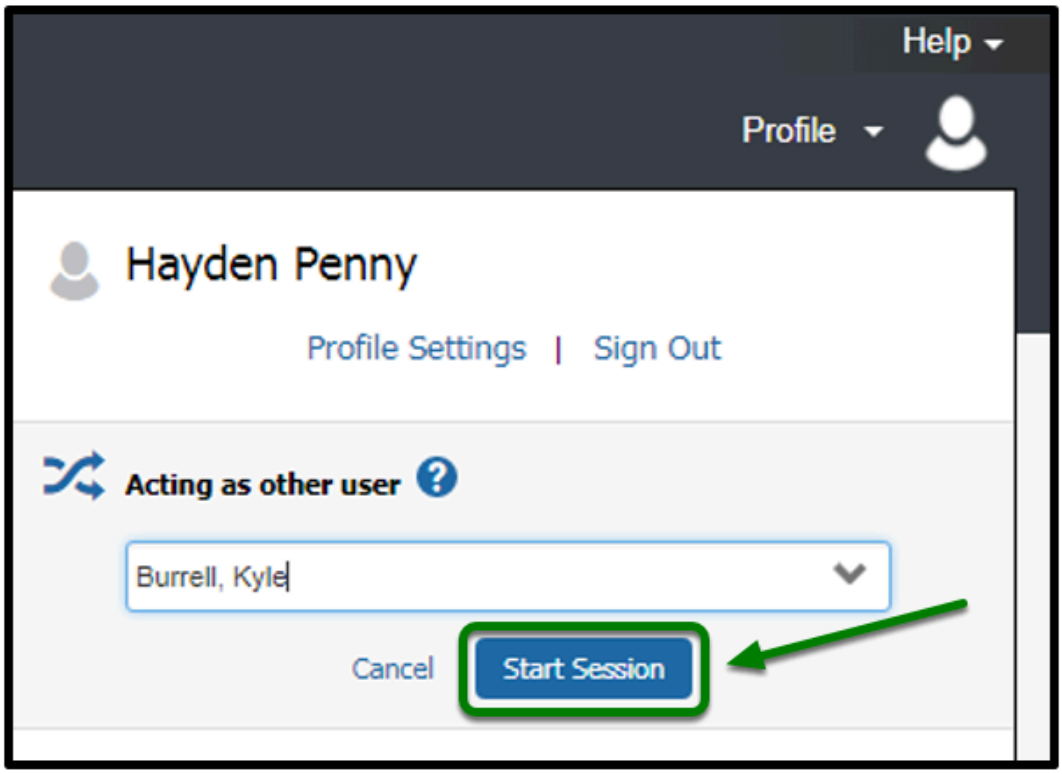
Step 2: In the profile, the delegate will have a new field called **Acting as other user**. Type in the user whom you are a delegate for, or click on the drop-down list.



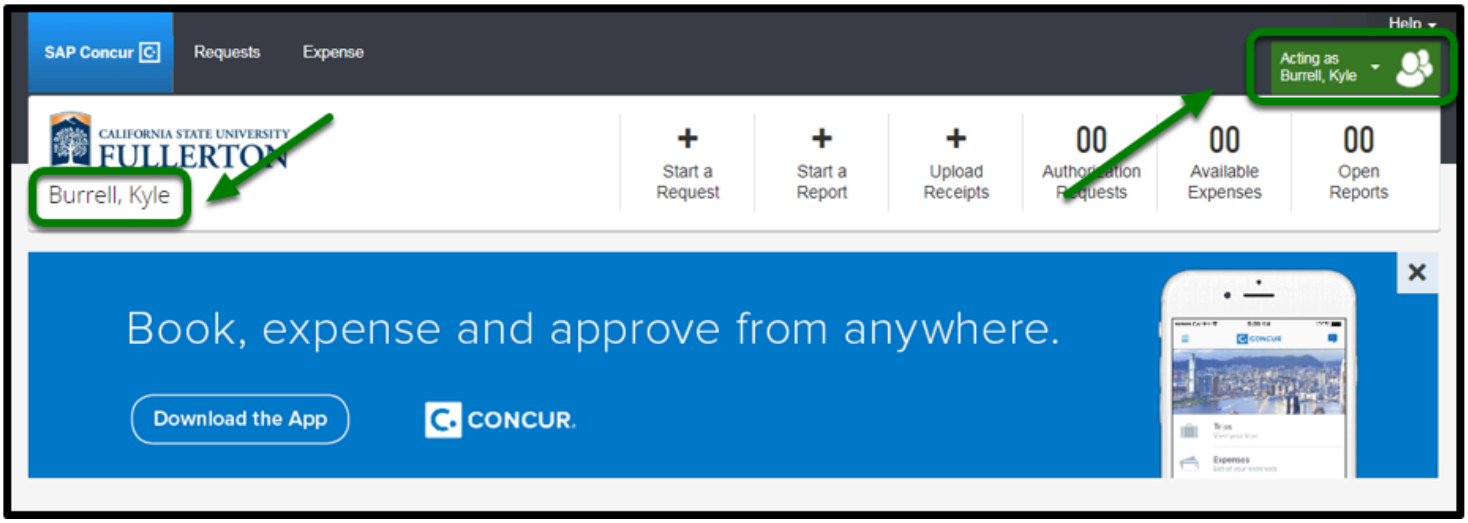
Step 3: Select the user you would like to prepare request/reports or preview for by clicking on the name in the drop-down.



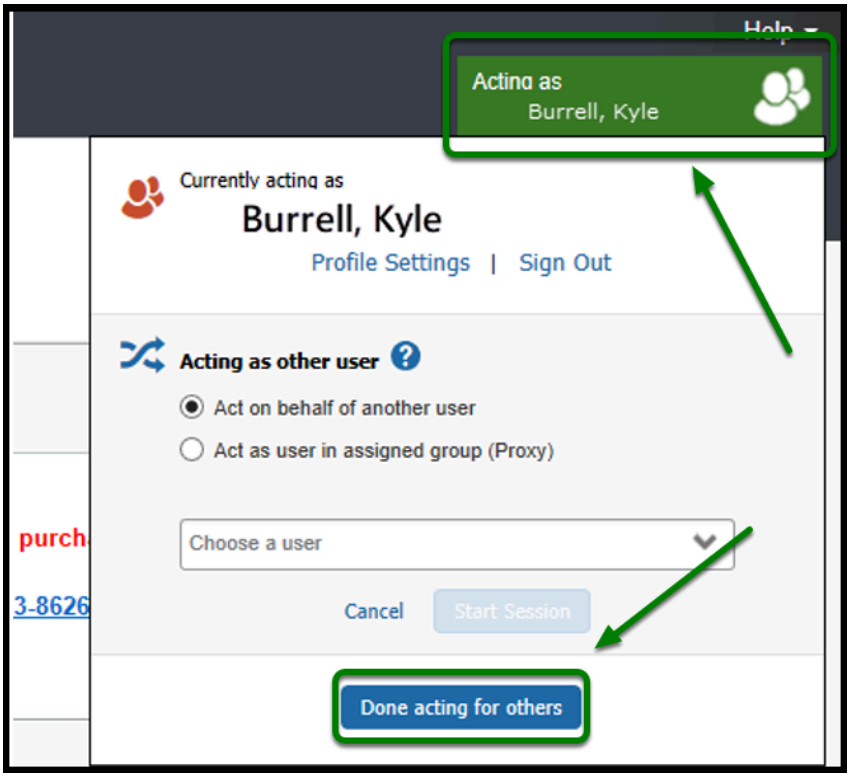
Step 4: After you have selected the name of the user, click on **Start Session**.



Step 5: Concur will then load the page as if you are viewing from the user's perspective. As noted in the green box, these are the areas that will indicate whose profile you are working in.



Step 6: Once you have completed delegating on behalf of someone else, click on the top right green box stating **Acting as.** Then, click **Done acting for others**.



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Need more help?

Contact Concur Support at concur@fullerton.edu or at 657-278-3600.