Removing Delegate Access

These instructions cover how a delegate can remove their remove delegate access, if the delegate no longer has to create requests and reports for an employee. It also covers how an employee can remove delegate from their Concur Account.

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If you need assistance with logging into Concur, please go to Logging into Concur......0

Delegate Removing Their Access

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



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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 **Delegate For** to remove your delegate access.

Profile Personal Inform	nation	Change Passw	ord System Settings	Mobile Registration	Mobile Devices	Travel Vacation Reassignment	
Your Information Personal Information Company Information Contact Information Email Addresses Emergency Contact Credit Cards Travel Settings		quest (pates Delegati 5 Save D thes are employees se and Request sha	Delegates For oto who are allowed to perform wor we delegates. By assigning per	k on behalf of other employees missions to a delegate, you are	assigning permissions for f	Expense and Request.	
Travel Preferences		Name	Can Prepare	Can View Receipts	Can Us	e Reporting	Receives Emails
International Travel Frequent-Traveler Programs Assistants/Arrangers				Ν	lo records found.		
Request Settings Request Information Request Delegates							

Step 5: Locate the employee that you no longer wish to have delegate access for.

Req	Request Delegates							
Delegates	Delegates Delegate For							
Delete								
This employ	yee may act as a delegate for the listed employe	865.						
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Step 6: Once you locate the employee, click on the check box next to their name.

Red	quest Delegates						
Delega	ates Delegate For						
Dek	ete						
This employee may act as a delegate for the listed employed. Expense and Request share delegates. By assigning the sistions to a delegate, you are assigning permissions for Expense and Request.							
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Step 7: Click on the Delete button.

Red	Request Delegates								
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This emp Expense	ployee may as use delegate for the listed em and Request share delegence By assigning p Name	ployees. permissions to a delegate, you Can Prepare	are assigning permissions for Exp Can View Receipts	ense and Request. Can Use Reporting	Receives Emails				
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	Fullerton, CSUF 8 afitfullerton@gmail.com Peterson, Sloane cmstraining20@fullerton.edu	Ø	8	0	8				

Repeat this process if you need to remove your delegate access from another employee's Concur Account.

Employee Removing Delegate's Access

Step 1: Once you are taken to Request Delegates page, click on **Delegates**.

Request Delegates									
Delegates	Delegates Delegation								
Add	Save Delete								
Delegates a	are employees who are allowed to perform work of	on behalf of other employ	yees.						
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.									
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Expense an	d Request share delegates. By assigning permit Name Frye, Cameron cmstraining19@fullerton.edu Peterson, Sloane cmstraining20@fullerton.edu Rooney, Ed cmstraining17@fullerton.edu	can Prepare	are assigning permissions for Exp Can View Receipts Can View Receipts Can View Receipts Can View Receipts Can View Receipts	ense and Request. Can Use Reporting	Receives Emails				

Step 2: Locate the delegate you want to remove from your delegate list.

Requ	Request Delegates								
Delegates	Delegates Delegate For								
Add	Save Delete								
Delegates ar	re employees who are allowed to perform	work on behalf of other employ	yees.						
Expense and	d Request share delegates. By assigning g	ermissions to a delegate, you	are assigning permissions for Exp	ense and Request.					
	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails				
	Frye, Cameron cmstraining19@fullerton.edu	×	×		×				
	cmstraining20@tullerton.edu								
	Rooney, Ed				8				

Step 3: Once you locate the delegate, click on the check box next to their name.

Requ	Request Delegates									
Delegates	Delegates Delegate For									
Add	Save Delete									
Delegates ar	re employees who are allowed to perform v	work on behalf of other employ	ees.							
Expense and	d Request share delegates. By assigning p	ermissions to a delegate, you	are assigning permissions for Exp	ense and Request.						
	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails					
8	Frye, Cameron cmstraining19@fullerton.edu	•	۲		×					
	cmstraining20@fullerton.edu									
	Rooney, Ed cmstraining17@fullerton.edu		×		×					

Step 4: Click on the Delete button.

Requ	Request Delegates								
Delegates Add	Delegate For Add Save Delete								
Delegates ar Expense and	re employees who are allower to perform work o d Request share delegates. By assigning permiss	n behalf of other employe sions to a delegate, you ar	as. e assigning permissions for Expense	and Request.					
	Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails				
	Frye, Cameron cmstraining19@fullerton.edu				8				
	Peterson, Sloane cmstraining20@fullerton.edu	•	2		2				
	Rooney, Ed cmstraining17@fullerton.edu	Ø	2		2				

Repeat this process if you need to remove other delegate's access from your Concur Account.

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Need more help?

f Contact Concur Support at <u>concur@fullerton.edu</u> or at 657-278-3600.