

How to set up delegates

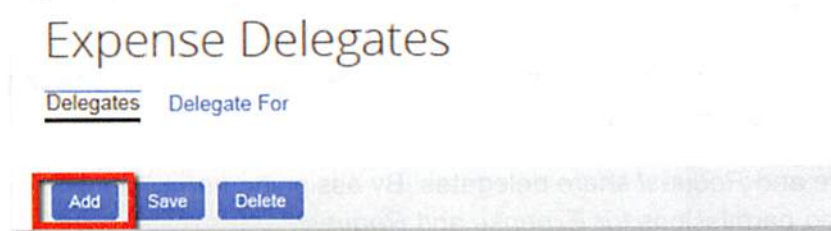
Objective: Go over the steps to assign someone else (your delegate) to create, edit, and/or submit requests and expense reports for you.

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

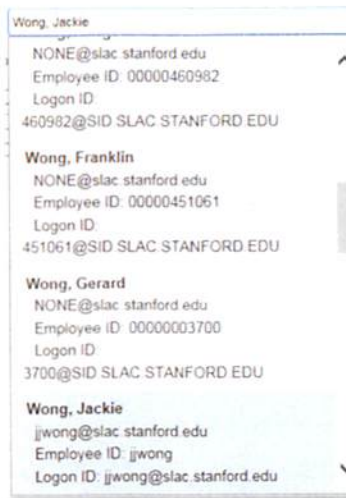
1. Log into **Concur** using your SLAC credentials.
2. From the home page, go to the *Profile* dropdown and click **Profile Settings**



3. Under the *Expense Settings* category click **Expense Delegates**.
4. Once in the *Expense Delegates* page, Click **Add** to select a new delegate.



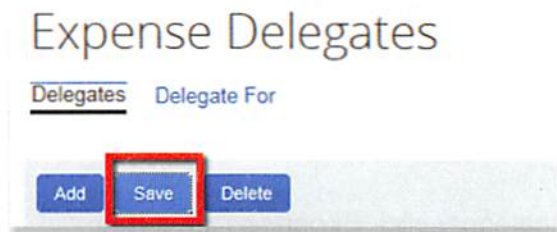
5. Type in your delegate's name in the search bar and select the name.



6. Specify which tasks the delegate can perform on your behalf by checking all the appropriate check boxes

<input type="checkbox"/>	Name	Can Prepare	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails
<input type="checkbox"/>	Paige, NonUS-SG glennap@slac.stanford.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Wong, Jackie jjwong@slac.stanford.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

7. Click **Save** once completed



Important Notes:

- You can visit your *Expense Delegates* settings at any time to manage your delegates list as well as their permissions.
- *Expense* and *Request* share delegates. By assigning permissions to a delegate, you are assigning permissions for *Expense* and *Request*.
- The *Delegate For* tab shows the people who you are a delegate for. In other words, you can see the name of employees who you can perform work for in this tab.

