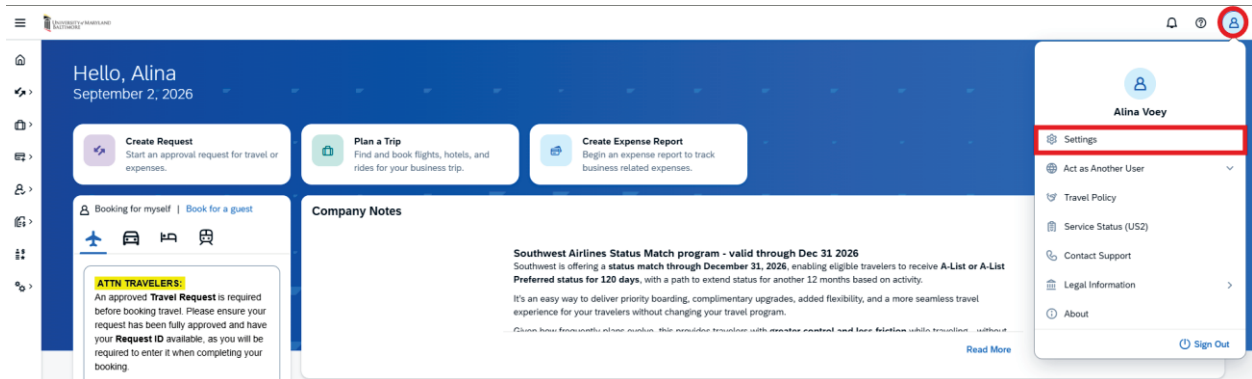


Concur – Setting up a Delegate

*Screenshots may appear differently for each user depending on the access that you have.

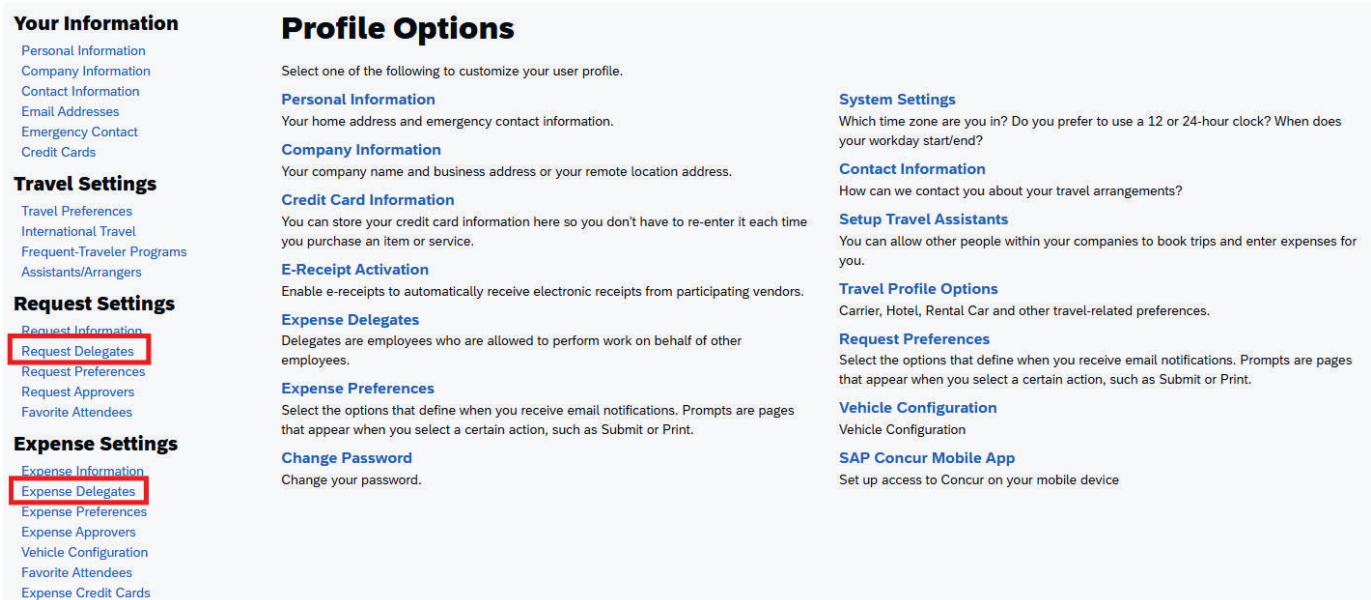
Step 1: Navigate into Profile Settings

- From the Concur homepage, select the **profile icon** on the top right-hand corner, then select **Settings**.



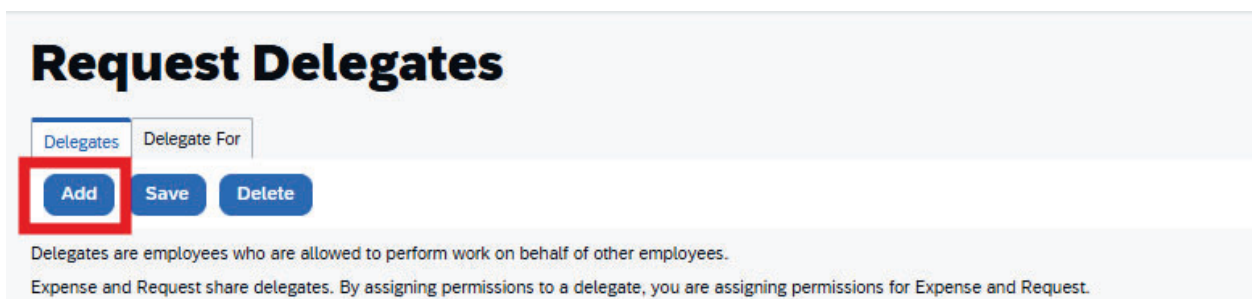
Step 2: Navigate into Request Delegates or Expense Delegates

- Select either **Request Delegates** or **Expense Delegates** on the left-hand menu.
Note: A delegate assigned in **Request** will automatically carry over to **Expense**, and vice versa.



Step 3: Add your Request/ Expense Delegate

- Click on the **Add** button.



- In the **search box**, type in the name of the delegate you wish to assign, select the correct user, and click on the **Add** button next to the search box.

Request Delegates

Delegates

Delegate For

Add Save Delete

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

Search by employee name, email address or login id

Shana Bynon

Add Cancel

Shana Bynon
sbynon@umaryland.edu

By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

Can Prepare Can View Receipts Receives Emails

Step 4: Assign Permissions

There are three separate permissions that you can assign to the selected delegate – a request/expense delegate, an approver delegate, and a temporary approver delegate.

Assigning a Request or Expense Delegate

- To assign a delegate who can prepare requests and expense reports on your behalf, select the **Can Prepare**, **Can View Receipts**, and **Receives Emails** boxes, then click on the **Save** button.

Request Delegates

Delegates

Delegate For

Add Save Delete

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

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

☐	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
☐	Bynon, Shana sbynon@umaryland.edu	☒	☒	☒	☐	☐	☐	☐

Assigning an Approver Delegate

- To assign a delegate who can approve on your behalf (you must have an approver role), the **Can Approve**, **Receives Approval Emails**, and **Can View Receipts** will need to be checked, then click on the **Save** button.

Request Delegates

Delegates

Delegate For

Add Save Delete

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

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

☐	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
☐	Bynon, Shana sbynon@umaryland.edu	☐	☒	☐	☒	☐	☐	☒

Assigning a Temporary Approver Delegate

- To assign a **temporary approver delegate**, the **Can View Receipts**, **Can Approve Temporary**, and **Receives Approval Emails** box will need to be checked. You will select the **date range** that the user will be authorized to approve on your behalf, then click on the **Save** button.

Request Delegates

Delegates

Delegate For

Add Save Delete

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

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

☐	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
☐	Bynon, Shana sbynon@umaryland.edu	☐	☒	☐	☐	☒ 09/21/2026 09/25/2026	☐	☒

Step 5: Confirm the Delegation

After the delegate has been assigned, ask the delegate to confirm that they can access the delegation:

- The delegate should navigate to **Request Delegates** or **Expense Delegates**.
- Select the **Delegate For** tab.
- Your name should appear as the person they are assigned to support.

Request Delegates

Delegates

Delegate For

Delete

This employee may act as a delegate for the listed employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

☐	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
☐	Voey, Suntrea avoey@umaryland.edu	☒	☒	☒	☐	☐	☐	☐