Assign an Approval Delegate

Situation: Individual chooses to assign another person to approve expense reports on their behalf, while they are out of the office or unavailable

**Step One: Locate Expense Delegates screen in Concur**

- Log into Concur
- Click the **Profile** drop-down on the top right hand side of the screen and select **Profile Settings**
  
  ![Profile Settings](image.png)

- In the left hand margin, select **Expense Delegates**

  ![Expense Delegates](image.png)
Step Two: Select a Delegate and Authorize Activities they can perform on your behalf

- Click the Add button
- Use the Search field to find the person you wish to assign as your delegate
- When the name appears, click on it. Their name will now appear in the box
- **NOTE:** If the individual is not currently an Approver in Concur, they will not be able to be assigned as an Approver Delegate.
- On the right side of the screen below, check the boxes that describe the permissions you are giving to the delegate – the activities they can do on your behalf.
  
  - You can elect to have them approve only temporarily by putting in a date range, or give them the access to do so at any time by clicking the Can Approve box. Always select Receives Approval Emails.
- SAVE.
- **Note:** If you select “Can Approve Temporary”, the end date only applies to the delegate’s ability to approve reports. *The approver delegate will continue to receive approval emails after the end date.* In order to turn off approval emails, the person who assigned the delegate needs to uncheck the “Receives Approval Emails” box upon returning to the office.

For instructions on approving expense reports on behalf of someone else as a delegate, please refer to the instructional guide Approve an Expense Report as a Delegate.