Overview
In Concur, a delegate is someone who is authorized to process expense reports on behalf of another Concur user. Some important points about delegates:

- Delegates can prepare, but not submit, expense reports. Submitting an expense report is the responsibility of the employee that incurred the expenses.
- When a report is ready to be submitted, you will receive a notification from Concur, and you will need to review and submit the report for approval.
- Delegates cannot view your personal bank information, or edit certain parts of your Concur profile, such as changing passwords.

This Guide provides instructions on how to assign a delegate to prepare expense reports for you.

Assigning Delegates
After logging in to Concur with your HarvardKey, the Concur Home Page appears. Assigning, removing, and maintaining delegates are controlled within your Concur Profile.

To assign a delegate:

1. Click the Profile button at the top right of the window.

2. Click Profile Settings.

3. On the left side of the Profile Options page, under Expense Settings, click Expense Delegates.
4. On the Expense Delegates page:
   a. Click Add. A search bar appears.
   b. Enter the name or ID number of the person you want to assign as your delegate.
      - As you enter the first few characters of your search, the system will provide options that match what you've entered so far.
   c. Select the desired delegate when it appears in the list.
   d. Click the Add button to the right of the search field.

5. Next to the delegates name, select the checkboxes for the tasks you want your delegate to be able to perform on your behalf:
   - In order for a delegate to create expense reports and attach receipts, you must select the Can Prepare and Can View Receipts checkboxes.
   - If you want your delegate to be copied on emails you receive from the Concur system, select the Receives Emails checkbox.
   - If you and your delegate are also Approvers, you can assign approval-related tasks by selecting the appropriate checkboxes (Approval Delegates are covered in a separate Guide).

6. Click Save.
Resources

Quick Reference Guides and Online Tutorials
Quick Reference Guides provide step-by-step instructions on a number of common tasks in Concur, and online tutorials present a video walk-through of how to perform various tasks and procedures within the system. Both the Guides and online tutorials are available at: travel.harvard.edu/concur-training

Concur Support
24 hour support is available through the Concur Support Desk at 866-793-4040. You can also access the Concur Support Portal within the system by clicking the Help menu, and then selecting Contact Support.