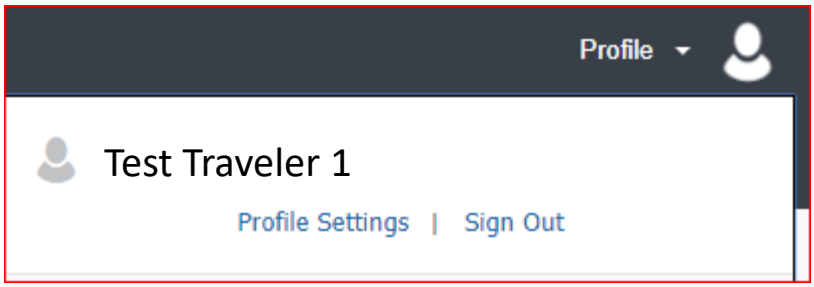
Setting Up Delegates

Objective: This section will go over the steps to assign someone else (your delegate) to create and/or edit a Travel Request and Expense Report for you.

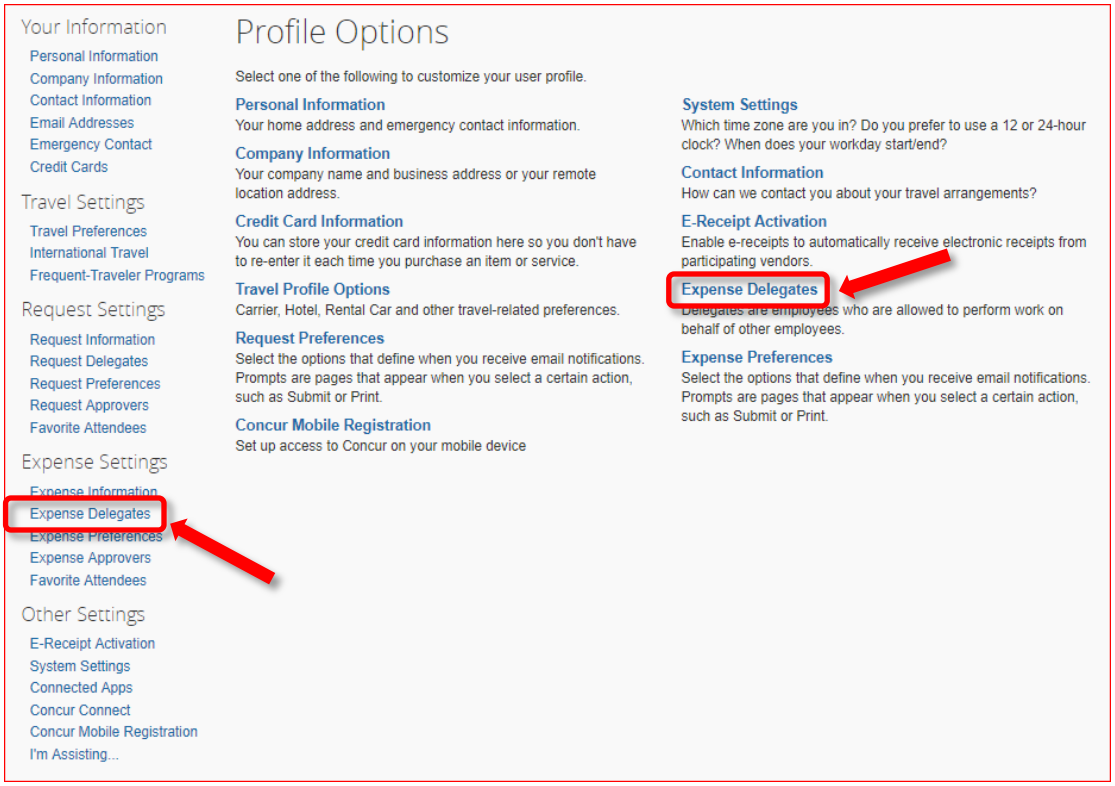
*Delegates cannot submit or approve a Travel Request / Expense Report on behalf of the user.

1. **Log in** to Concur using your PPPL credentials.

2. From the home page, go to the Profile dropdown and **click** on *Profile Settings*.



3. Under the *Expense Settings* category, **click** on *Expense Delegates*.



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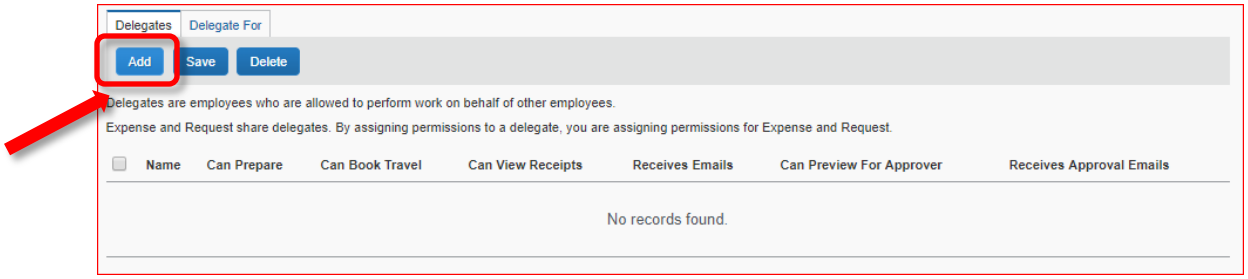
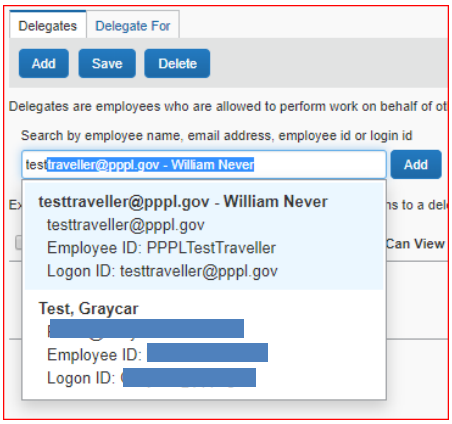
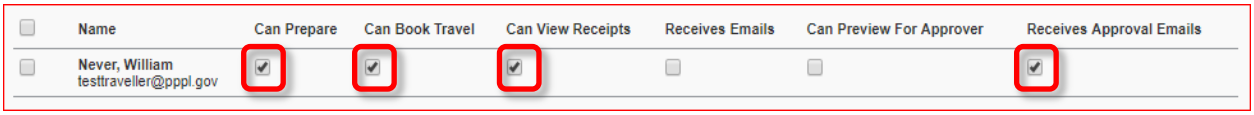
4. Once in the *Expense Delegates* page, **click** *Add* to select a new delegate.



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



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



7. **Click** *Save* once completed.

Note: You can visit your *Expense Delegates* settings at any time to manage your delegates list as well as their permissions.

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

Note: The Delegate For tab shows the people who you are a delegate for. In other words, you can see the names of the employee who you can perform work for in this tab. *You cannot self assign to be a delegate.