

# Expense Delegates - Add, edit, or delete

Use the **Expense Delegates** page to:

- **Add** a delegate - assign another Expense user to act on your behalf and define the tasks that delegate can complete.
  - **Edit** the tasks assigned to an existing delegate.
  - **Delete** a delegate.
- ❖ Only the **Delegator** can assign someone to act on their behalf. An existing delegate for that Delegator is not permitted to perform that action.

## Access

To access this option, log into iBuy Expense Reporting and click **Profile > Profile Settings > Expense Delegates** category. **Add a delegate**

1. On the **Expense Delegates** page, click **Add**. The search area appears.
2. Type at least the first three letters of the search criteria (employee's name, email address, etc.).
3. When the desired employee appears, click the name.
4. Checkmark the boxes for the delegate permissions you would like to the employee to have. For doing reports on your behalf, you must select at least the first three permissions.
5. Click Save

Permission	Description
<b>Can Prepare</b>	If selected, the delegate can create expense reports and requests (if using Concur Request) on your behalf.
<b>Can Submit Reports</b>	If selected, the delegate can submit expense reports and cash advances on your behalf. <b>NOTE:</b> If you do not allow the delegate to submit, you receive an email notification when the delegate has completed the expense report and it is ready for submission.
<b>Can View Receipts</b>	If selected, the delegate can view receipt images on your behalf.
<b>Can Use Reporting</b>	If selected (enabled), the delegate can use Concur Insight (formerly Analysis/Intelligence) on behalf of another
	employee.
<b>Receives Emails</b>	If selected, the delegate receives a copy of each ExpensereLATED email that you receive, except for approval emails.
<b>Can Approve</b>	If selected, the delegate can approve expense reports, cash advances, and requests (if using Concur Request) on your behalf, without date constraints.

<p align="center"><b>Can Approve Temporary</b></p>	<p>If selected, the delegate can approve expense reports, cash advances, and requests (if using Concur Request) on your behalf on your behalf but only for the specified period. If you select this option, you must also select beginning and ending date.</p>
<p align="center"><b>Receives Approval Emails</b></p>	<p>If selected, the delegate receives a copy of each Expenseapproval-related email that you receive. <b>NOTE:</b> The delegate cannot approve or reject the expense report via email.</p>

**NOTE:** The **Can Approve**, **Can Approve Temporary**, and the **Receives Approval Emails** options appear only if:

- You are an Expense approver.
- The delegate is an Expense approver if your company's configuration requires it.

### **Edit delegate information**

1. On the **Expense Delegates** page, make the desired changes. (Refer to the information about adding delegates for descriptions of the various options.)
2. Click **Save**.

### **Delete a delegate**

1. On the **Expense Delegates** page, select the check box to the left of the desired delegate.
  2. Click **Delete**.
-