



# Travel Management System (TMS)

JOB AID # 1.05

Date: 1/31/2015

## Job Aid Description: Add or Delete Expense Delegates

An Expense Delegate is an individual(s) authorized by the traveler to prepare and track expense reports on their behalf. **Delegates cannot submit reports!**

### Add an Expense Delegate

1. At the top right of the My Concur page, click **Profile** and then **Profile Settings**.
2. On the **Expense Settings** menu on the left side of the page, click **Expense Delegates**.
3. On the **Expense Delegate** page, click **Add**
4. In the **Search by employee name, email address or logon id** field, type the last name of the delegate you wish to add.
5. From the list of matches, select the appropriate person. Click **Add**.
6. Select the responsibilities you wish this delegate to perform on your behalf.
7. Click **Save**.

### Delete an Expense Delegate

1. At the top right of the My Concur page, click **Profile** and then **Profile Settings**.
2. On the **Expense Settings** menu on the left side of the page, click **Expense Delegates**.
3. Click on the box to the left of the name of the Delegate you would like to delete.
4. Click **Delete**
5. Click **Save**.