How to add an Expense Delegate

This Quick Reference Guide demonstrates how a user grants Expense Delegate access to their profile.

An Expense Delegate is created when there is a need for someone else to submit a Travel and Expense report on your behalf.

To access Concur go to BUworks Central Portal Web-Site Page and follow the menu path below:

Menu Path: BUworks Central Portal   ESS   Travel Reimbursements   Manage Business Travel Arrangements and Reimbursements   Concur Travel & Expense Home Page
How to add an Expense Delegate

1. Click on **Profile** button located on right hand side of **Concur Home** tab
2. Select and Click **Profile Settings** to display **Profile Options**
3. Select and click on **Expense Delegates**
** In most cases the above permissions set up should be used in order to ensure your Expense Delegate has the proper access to your profile.

4 Select **Delegates** to assign an individual(s) to be an Expense Delegate.

Do **not** select **Delegate For**

5 Click **Add** button to locate, search and select the individual(s) you are granting access to your Concur Expense profile. Searching by **Boston University** email address is most efficient

6 Select desired level of permission to be granted by utilizing the available check boxes.

.Options include: Can Prepare, Can Submit Reports, Can View Receipts, Receives Emails, Can Approve, Can Approve Temporary, Can Preview for Approver, Receives Approval Emails

**Important:** Select & check the **Receives Email** box if you’d like for your **Expense Delegate** to be informed of the status of your submitted report.

7 Click **Save** button to finalize Expense Delegate set up.

You have assigned permission and access for your new Expense Delegate.