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
Concur Travel and Expense Home Page

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.

    Information
    
    **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**.

    Information
    
    **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 Submit Requests, Can View Reports and Receive 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.