

HOW TO CONCUR: setting up an Expense Delegate

In order to have a delegate process expense reports (reimbursement requests) for you, they need to be set up as your Expense Delegate. This means that they can temporarily log into the Concur expense system as you in order to submit the report.

Remember: in order to receive a reimbursement, you will need to send your Expense Delegate (1) details of your trip, and (2) itemized receipts for *all* expenses. It would be most helpful if you could fill out this form, to avoid a lot of questions and back-and-forth:

https://ece.wufoo.com/forms/w1sfowtn0j7hvab/

First, log into BUWorks using your BU username and Terrier password. Select the **Employee Self-Service** tab at the top of the screen, and from there, select **Travel and Expense Reimbursements**.

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Employee Self	f-Service Finance ACCT XWalk	Reporting Procurement Worklist	WebGUI
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Employee Se	rvices		
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▼ Hom	epage List of Services Search		▼
Time	Services	Personal Information	Please take a moment to ensure that your Emergency Contact information on file is current and if you have not already done so, please provide your Race and Ethnicity dat
Review your ti record	w your time balances and plan ime off. Weekly employees can d working time.	Manage your addresses, emergency contact, personal data, race/ethnicity/veteran status data. Display your family members and	Please select the Personal Information link to review and make the necessary updates. Boston University collects Race and Ethnicity data of its workforce for the purpose of reporting to
Quick	Links ecord Working Time	dependents.	government agencies. This data is considered confidential and will be used for University operations only.
Tir	me Off Request	Work Environment	w Delated Links
6 Benef	fits	Display the University property assigned to you.	Job Opportunities
Displa curren benefi	ay the plans in which you are htly enrolled and enroll in new it plans.	Travel and Expense Reimbursements	Faculty & Staff Assistance Office Metro Credit Union BU Directory
Quick	Links	Review the University's Travel Policy, apply for a Travel Credit Card, and manager Travel and Exercise	✓ Most Frequently Used
🖻 BU	U Total Rewards and myFiTage	Reimbursements via Concur.	Manage Business Travel Arrangements and Reimbursements

On the next screen, select **Manage Business Travel Arrangements and Reimbursements**, as shown below. Concur will open in a new window, and automatically log you in.

→ If Concur does not open, check to make sure your pop-up blocker is disabled.

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Home	Employee Self-Service	Finance ACCT XWalk	Reporting	Procurement	Worklist	WebGUI		
Overvie	ew							
	Travel and Expense	Reimbursements						
	Back							
	▼ Service Map							
	University Travel Card Read Travel Card Policy							
	Policies and Procedures							
	Review Travel Policy Page							
	Access a List of Travel Office Contacts							
	Concur Travel and Expense Reporting							
	Manage Business Travel Arrangements and Reimbursements							

Once your Concur window has opened, click the **Profile** drop-down window at the upper right of the screen, and select **Profile Settings**.

SAP Concur C	Travel	Expense	Approvals	App Center		Help 🗸 Profile 👻 😞
BOSTON UNIVERSITY Hello, ALLISON				➡ Start a Report	Uplc Rece	ALLISON JUSTINE KLEBER
TRIP SEARCH			ALER	TS		Acting as other user 😢

On the **Profile Options** page, you'll see a menu column on the left. Select **Expense Delegates**, under the **Expense Settings** header:



You will need to search for the correct BU employee using their name, email address, BU ID or login ID (i.e., the portion of their BU email address that comes before the @ sign). Select the correct employee from the drop-down, and click the **Add** button:

SAP Concur C Travel	Help - Expense Approvals App Center					
Profile Personal Information	System Settings Concur Mobile Registration					
Your Information	Expense Delegates					
Personal Information Company Information	Delegates Delegate For					
Contact Information Email Addresses	Add Save Delete					
Emergency Contact	Delegates are employees who are allowed to perform work on behalf of other employees.					
Credit Gards	Search by employee name, email address, employee id or login id					
Travel Settings	HENNESSEY, KAREN Add Cancel					
Travel Preferences International Travel Frequent-Traveler Programs Assistants/Arrangers	HENNESSEY, KAREN khenness@bu.edu User ID: U14883358 Logon ID: khenness1@bu.edu					
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You have added an **Expense Delegate**! Please make sure that the four boxes indicated below are all checked, in order to allow a smooth report creation and submission process:



You're all set! Your Delegate will let you know if they have any trouble fulfilling your requests.

4/16/2020