

ASSIGN DELEGATES FOR EXPENSING, TRAVEL, AND APPROVALS

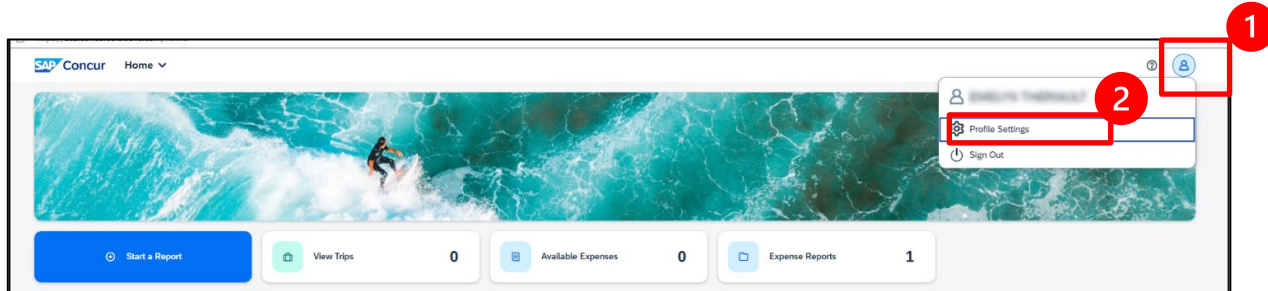
ASSIGNING EXPENSE & TRAVEL BOOKING DELEGATES:

In order for another BU employee to complete expense reports and/or book travel on your behalf, you must assign them as your expense delegate in Concur. Expense reports exist solely in the report owner's Concur account and cannot be transferred to another user. For this reason, delegates must be assigned in advance to assist with report preparation or travel booking.

You may assign multiple delegates. Once assigned, delegates can prepare expense reports, book travel, submit expense reports, view receipts, and receive emails from SAP Concur.

To Assign an Expense Delegate:

1. Sign in to Concur through the [BUworks Central Portal](#) to access your home page.
2. Select the "Profile" icon (top right) and select "Settings" to display the Profile Options page.



3. Click on "Expense Delegates."

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

Expense Settings

- Expense Information
- Expense Delegates**
- Expense Preferences
- Expense Approvers
- Favorite Attendees
- Expense Credit Cards

Other Settings

- E-Receipt Activation
- System Settings
- Concur Connect
- SAP Concur Mobile App

Profile Options

Select one of the following to customize your user profile.

Personal Information
Your home address and emergency contact information.

Company Information
Your company name and business address or your remote location address.

Credit Card Information
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

Travel Profile Options
Carrier, Hotel, Rental Car and other travel-related preferences.

Request Preferences
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

SAP Concur Mobile App
Set up access to Concur on your mobile device.

System Settings
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information
How can we contact you about your travel arrangements?

E-Receipt Activation
Enable e-receipts to automatically receive electronic receipts from participating vendors.

Expense Delegates
Delegates are employees who are allowed to perform work on behalf of other employees.

Expense Preferences
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

4. Select the Delegates tab (do not select "Delegate For").
5. Click the "Add" button and enter the employee's name or email. Select the name and click "Add."

Expense Delegates for [Name]

Delegates are employees who are allowed to perform work on behalf of other employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

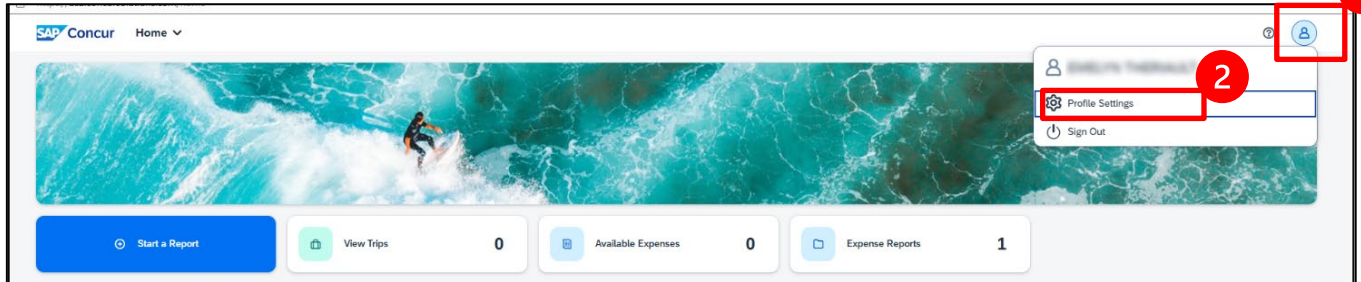
☐	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails
☐	[Name]	☒	☒	☒	☒	☒	☒

6. You must assign individual permissions to your expense delegates (Concur does not grant them automatically). Select the checkboxes for the tasks you want the delegate to perform on your behalf. It is recommended to select "Receives Emails" so your delegate is notified if a report is returned by your supervisor.
 - **Can Prepare** – delegate is able to prepare expense reports but cannot submit them.
 - **Can Book Travel** – delegate is able to view and modify your profile and book travel on your behalf in Concur. A traveler may have multiple delegates who can book travel for them. (Previously, known as a "Travel Arranger/ Assistant.")
 - **Can Submit Reports** – delegate is able to prepare and submit expense reports.
 - **Can Submit Requests** – delegate is able to create card services requests and pre-trip approval requests.
 - **Can View Receipts** – delegate is able to view stored receipts and add receipts to expense reports.
 - **Receives Emails** – delegate will receive copies of approval email notifications and be notified of the status of submitted reports.
7. Click **Save** to complete the process of setting up your expense delegate.

ASSIGN APPROVAL DELEGATES:

Approvers can delegate their approval role to others by following the steps below.

1. Sign in to Concur [BUworks Central Portal](#) to access your home page.
2. Select the Profile icon on your Home page and select “Settings” to display the Profile Options page.



3. Click on “Expense Delegates” under the Expense Settings header.

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- Contact Information
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- Credit Cards

Travel Settings

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- International Travel
- Frequent-Traveler Programs

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

Expense Settings

- Expense Information
- Expense Delegates**
- Expense Preferences
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Other Settings

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Travel Profile Options
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Request Preferences
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SAP Concur Mobile App
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System Settings
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information
How can we contact you about your travel arrangements?

E-Receipt Activation
Enable e-receipts to automatically receive electronic receipts from participating vendors.

Expense Delegates
Delegates are employees who are allowed to perform work on behalf of other employees.

Expense Preferences
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.



4. Select the **Delegate For** tab to see the names of individuals to whom you can delegate approval permissions to. Select the checkbox beneath “Can Approve” to assign them approval permissions. Note: if approval permissions are assigned to a delegate, the original approval will still receive email notifications.
 - Select “Receives Approval Emails” if the Approval Delegate would like to be notified when reports are waiting for approval.
 - To set up an Approval Delegate for a specific time frame, complete the “Can Approve Temporary” field. This function is useful if the approver would like someone to approve reports awaiting their approval while they are out of the office or on vacation.

The screenshot shows the 'Can Delegate For' interface. At the top, there is a tab labeled 'Delegate For' (callout 4). Below the tab, there are three buttons: 'Add' (callout 5), 'Save' (callout 6), and 'Delete'. Below the buttons, there is a table with columns for various permissions. The table has two rows of delegates. The first row is for 'BARKER, RHETT' and the second row is for a redacted name. The columns are: Name, Can Prepare, Can Book Travel, Can Submit Reports, Can Submit Requests, Can View Receipts, Can Use Reporting, Receives Emails, Can Approve, Can Approve Temporary, Can Preview For Approver, and Receives Approval Emails.

☐ Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
☐ BARKER, RHETT rhett_barker@bu.edu	☒	☐	☒	☐	☒	☐	☐	☐	☐ [Calendar Icon]	☐	☐
☐ [Redacted Name]	☒	☐	☐	☐	☒	☐	☐	☒	☐ [Calendar Icon]	☐	☐

5. To add a delegate, click the “Add” button and search using criteria such as employee name or email (most efficient). Select the delegate from the list displayed and click “Add.” To delete a delegate from your profile, click “Delete.”
6. Click “Save” to complete the process of setting up your Approval Delegate.