

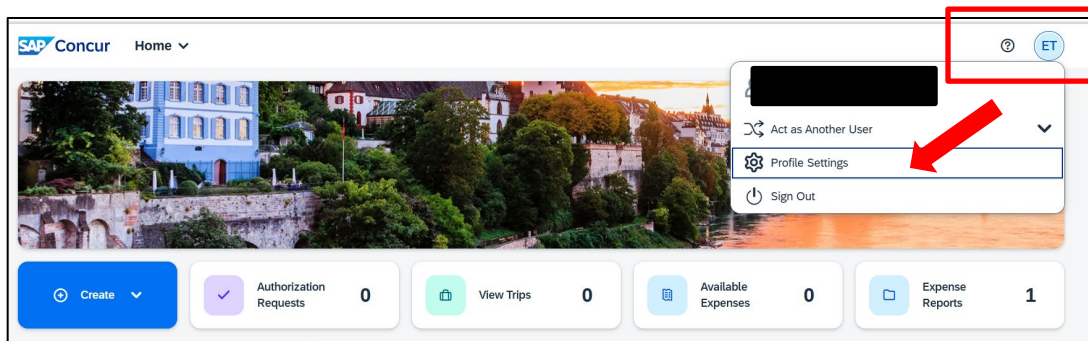
HOW TO ASSIGN EXPENSE DELEGATES

This guide demonstrates how to assign someone as an Expense Delegate in Concur. Since Expense Reports exist solely in the report owner's Concur account and cannot be transferred to a different user's account, you must assign someone to be your Expense Delegate if you are looking for them to complete tasks on your behalf.

Expense Delegates can perform the following: prepare expense reports, book travel, submit expense reports, view receipts, and receive emails from SAP Concur.

Note: A user can have multiple Expense Delegates.

1. Sign into Concur [BUworks Central Portal](#) to access your home page. [Reference: [How to Access Concur from BUworks](#)].
2. Select the **Profile** icon on your **Home** Page and select **Profile Settings** to display the Profile Options page.



3. The Profile Options page is displayed. Click on "**Expense Delegates**" under the **Expense Settings** header.

3

Your Information
[Personal Information](#)
[Company Information](#)
[Contact Information](#)
[Email Addresses](#)
[Emergency Contact](#)
[Credit Cards](#)

Travel Settings
[Travel Preferences](#)
[International Travel](#)
[Frequent-Traveler Programs](#)
[Assistants/Arrangers](#)

Expense Settings
[Expense Information](#)
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Other Settings
[E-Receipt Activation](#)
[System Settings](#)
[Concur Connect](#)
[Concur Mobile Registration](#)

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.

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.

Concur Mobile Registration
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?

Setup Travel Assistants
You can allow other people within your companies to book trips and enter expenses for you.

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

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.

- Select the **"Delegates"** tab to assign an individual(s) to be your Expense Delegate. Do not select "Delegate For."

4 **Delegates** Delegate For

Expense Delegates for CHASE MILANESE

5 **Add** Save Delete

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.

<input type="checkbox"/>	Name	6 Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails
<input type="checkbox"/>	[REDACTED] [REDACTED]@bu.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- To add a delegate, click the **Add** button and then use one of the search criteria, such as employee name or email (most efficient). Select the delegate from the list displayed and click **"Add."** [To delete an Expense Delegate from your profile, click the Delete button].
- Concur does not automatically provide an Expense Delegate with access, so you must grant permissions. Check the boxes for the functions you want your delegate to perform on your behalf. It is recommended that you select "Receives Emails" as this will automatically alert the delegate if the report is returned to you from your supervisor.
 - **"Can Prepare"** – permits delegate to prepare expense reports but not submit them
 - **"Can Book Travel"** – permits delegate to view and modify your profile and book travel on your behalf in Concur. A traveler can have multiple travel arrangers. (Previously, this function was accomplished by setting up a "Travel Arranger/Travel Assistant.")
 - **"Can Submit Reports"** – permits delegate to prepare & submit expense reports
 - **"Can Submit Requests"** – permits delegate to create card requests and pre-trip requests
 - **"Can View Receipts"** – permits delegate to view the receipts stored and add receipts to expense reports
 - **"Receives Emails"** – permits delegate to receive a copy of approval email notifications. Select this option if you'd like your Expense Delegate to be notified about the status of your submitted report. The approver will still receive email notifications even though approval permissions were assigned to a delegate.
- Click **"Save"** to complete the process of setting up your Expense Delegate.

You have completed the process to assign permission and access for your new Expense Delegate(s).