**BU** Procure to Pay

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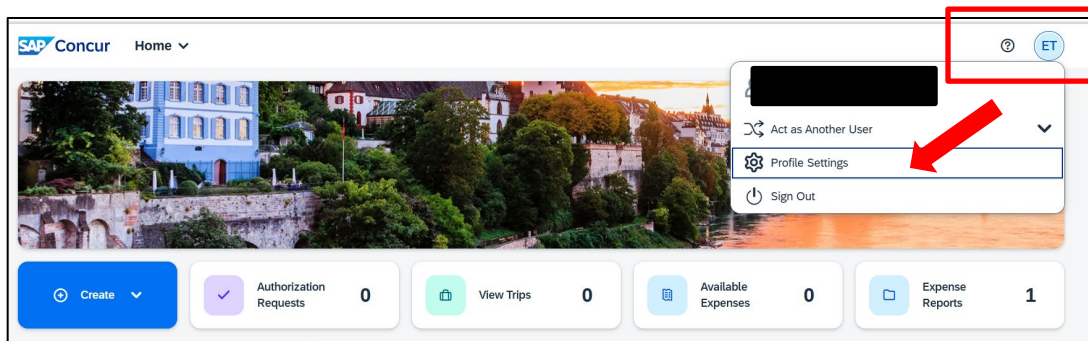
3. The Profile Options page is displayed. Click on "**Expense Delegates**" under the **Expense Settings** header.

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4. Select the "**Delegates**" tab to assign an individual(s) to be your Expense Delegate. Do <u>not</u> 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.

☐	**Name**	**6** **Can Prepare**	**Can Book Travel**	**Can Submit Reports**	**Can Submit Requests**	**Can View Receipts**	**Receives Emails**
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5. 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].

6. 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.

7. 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).