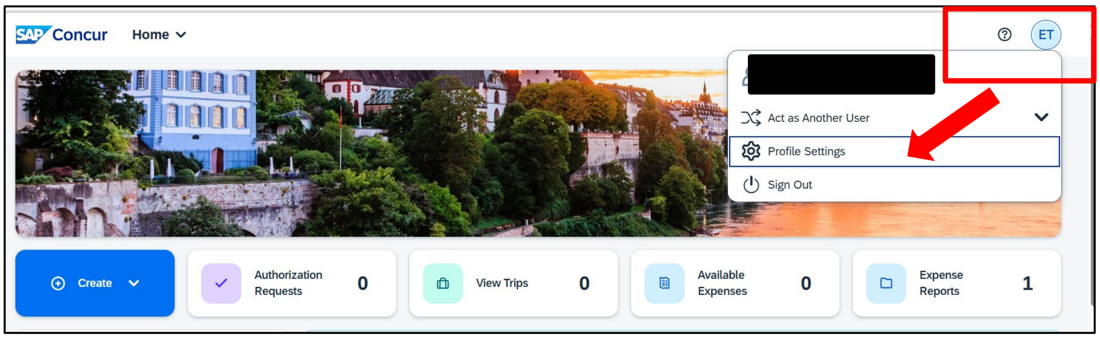
HOW TO ASSIGN DELEGATES

HOW TO ASSIGN EXPENSE DELEGATES:

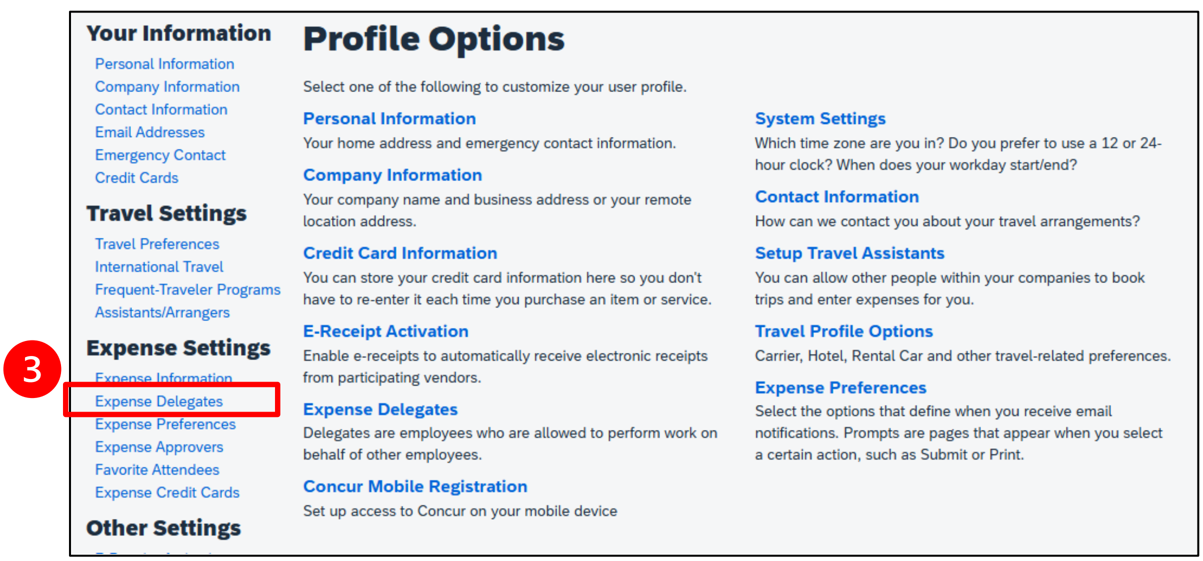
If you would like someone to complete tasks related to Expense Reports on your behalf, you must assign them to be your Expense Delegate. Expense Reports exist solely in the report owner's Concur account and cannot be transferred to a different user's account.

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

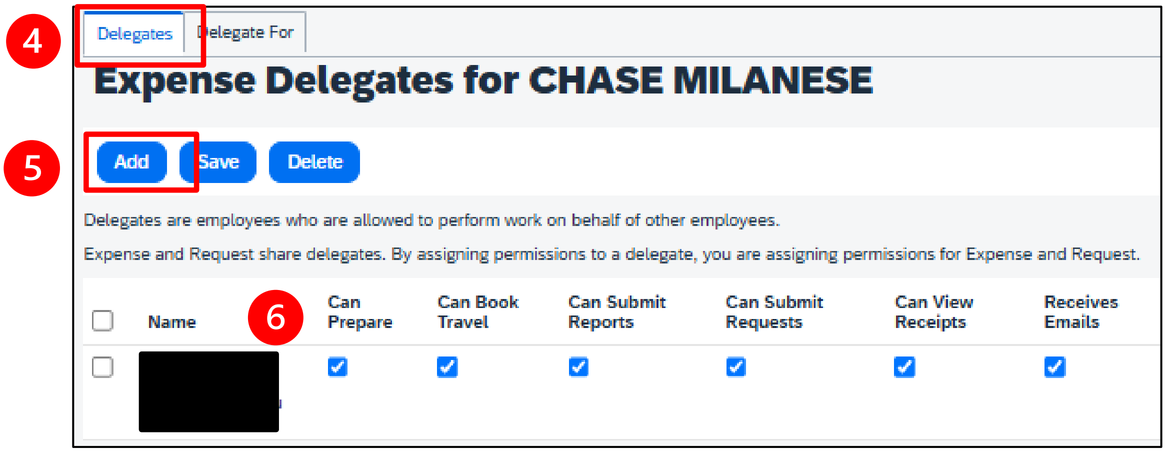
1. Sign in to Concur BUworks Central Portal to access your home page. [Reference: How to Access Concur from BUworks].
2. Select the **Profile** icon on your **Home** Page and select **Profile Settings** to display the Profile Options page.



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



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



5. To add a delegate, click the **Add** button and then search using 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 **Delete.**

6. Concur does not automatically provide an Expense Delegate with access, so you must grant permissions. Check the boxes for 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.

   - Click **Can Prepare** to permit delegate to prepare expense reports but not submit them.
   - Click **Can Book Travel** to permit 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.")
   - Click **Can Submit Reports** to permit delegate to prepare and submit expense reports.
   - Click **Can Submit Requests** to permit delegate to create card services requests and pre-trip approval requests.
   - Click **Can View Receipts** to permit delegate to view stored receipts and add receipts to expense reports.
   - Click **Receives Emails** to permit delegate to receive a copy of approval email notifications. Expense Delegate will be notified of the status of your submitted report if you select this option.

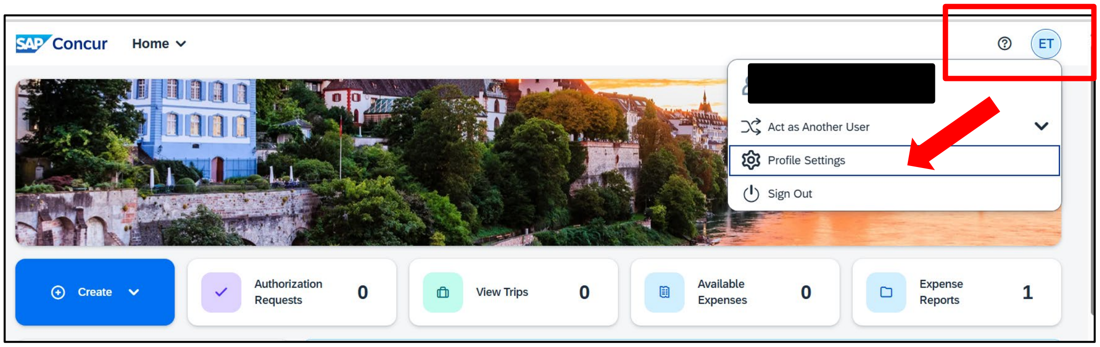
7. Click **Save** to complete the process of setting up your Expense Delegate.

HOW TO ASSIGN APPROVAL DELEGATES:

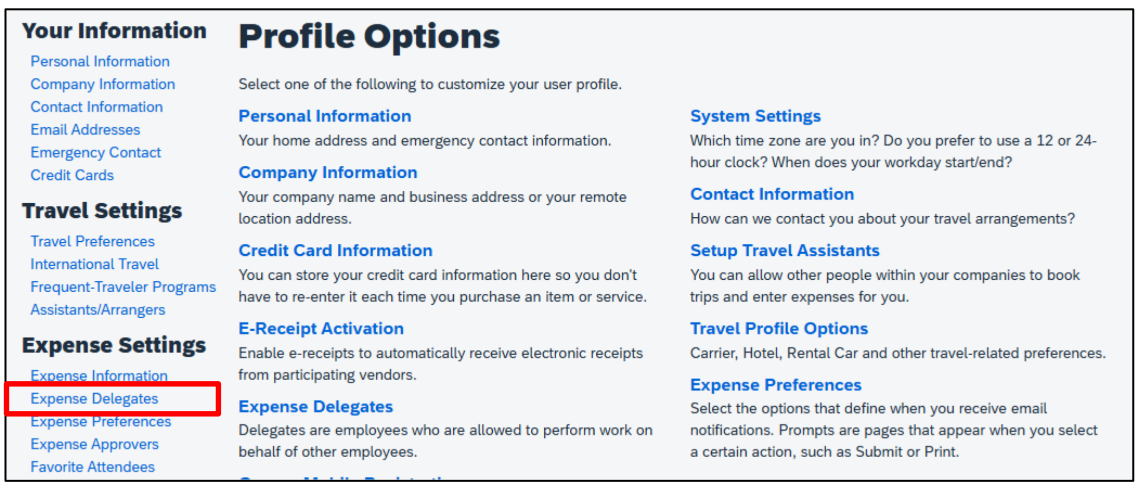
Approvers can delegate their approval role to others by following the steps below.

1. Sign in to Concur BUworks Central Portal to access your home page. [Reference: How to Access Concur from BUworks].

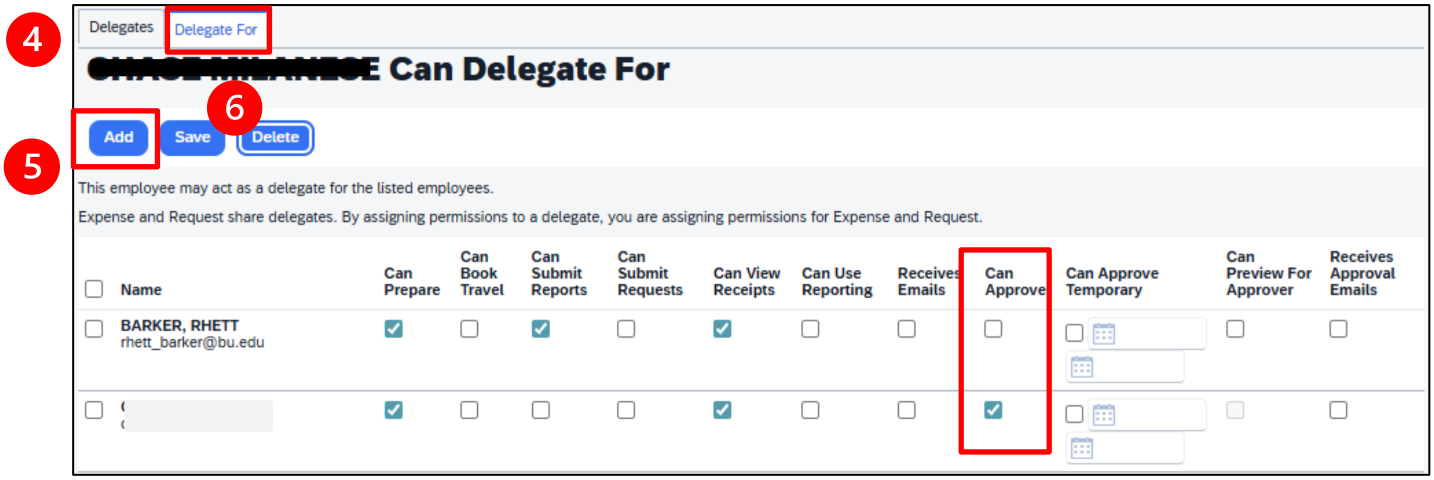
2. Select the **Profile** icon on your **Home** Page and select **Profile Settings** to display the Profile Options page.



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



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.



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 an Approval Delegate from your profile, click **Delete.**

6. Click **Save** to complete the process of setting up your Approval Delegate.