

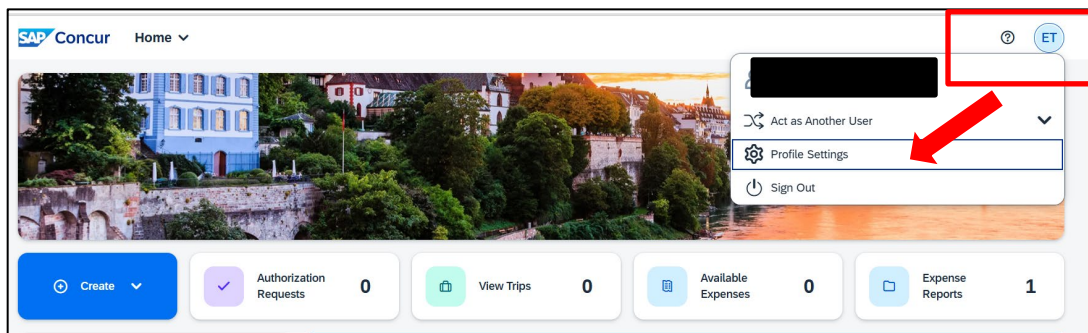
HOW TO ASSIGN DELEGATES

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.

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](#)
[Expense Delegates](#)
[Expense Preferences](#)
[Expense Approvers](#)
[Favorite Attendees](#)
[Expense Credit Cards](#)

Other Settings

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.

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

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Delegates Delegate For

Expense Delegates for CHASE MILANESE

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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.

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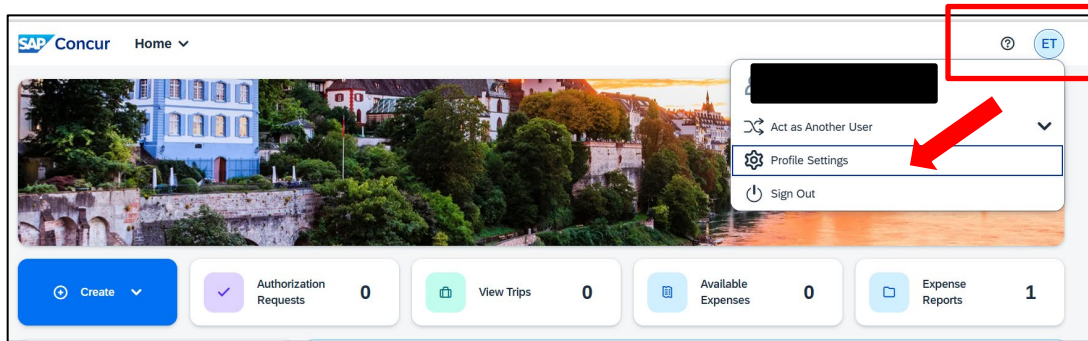
☐	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails
☐	[REDACTED]	☒	☒	☒	☒	☒	☒

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.

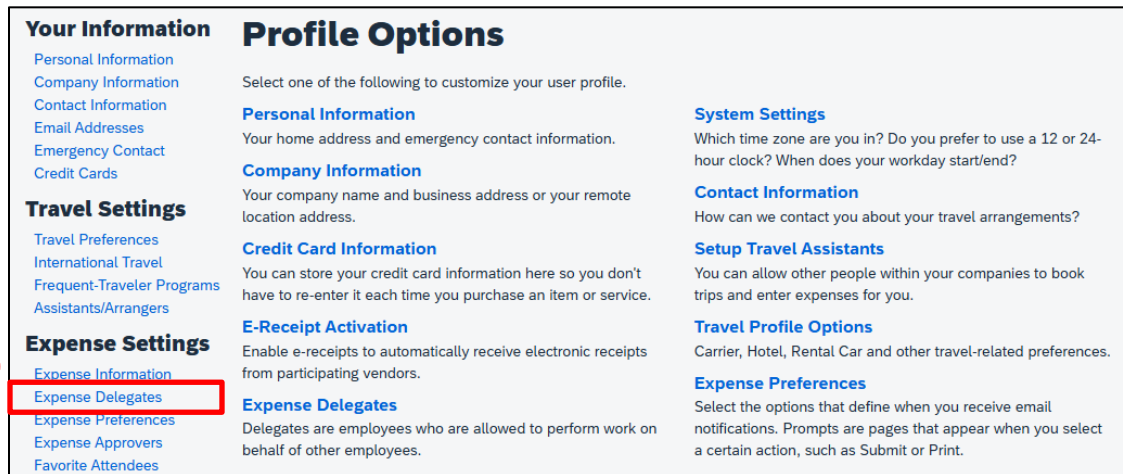
HOW TO ASSIGN APPROVAL DELEGATES:

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.



- 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.

4 **Delegates** **Delegate For**

6 **CHANCE MANNING Can Delegate For**

5 **Add** **Save** **Delete**

This employee may act as a delegate for the listed 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	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
☐ BARKER, RHETT rhett_barker@bu.edu	☒	☐	☒	☐	☒	☐	☐	☐	☐	☐	☐
☐ ()	☒	☐	☐	☐	☒	☐	☐	☒	☐	☐	☐

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