

## How to add an Expense Delegate

This Quick Reference Guide demonstrates how a user grants **Expense Delegate** access to their profile.

An **Expense Delegate** is created when there is a need for someone else to submit a Travel and Expense report on your behalf.

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Display the plans in which you are currently enrolled and enroll in new benefit plans. Display your salary statement and your direct deposit information. Quick Links Open Enrollment Salary Statement Personal Information Manage your addresses, emergency contact, personal Manage your addresses, emergency contact, personal Credit Card, and manage Travel and Expense Reimbursements via Concur. Credit Card, and manage Travel and Expense Reimbursements via Concur. Carpus Service Access on BUT Convenience Pla Employee Sett-Service Payroll Coordinator Organizational Coverview Employee Sett-Service Rea Back Service Map University Travel Card Read Travel Card Policy Submit an Application Policies and Procedures Review Travel Policy Page	5 10	Benefits and Pay		1	Travel Reimburse	ements					
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Concur Travel and Expense Reporting							(	Concur Travel a	nd Ex		

To access **Concur** go to <u>BUworks Central Portal Web-Site Page</u> and follow the menu path below:

**Menu Path**: <u>BUworks Central Portal</u>  $\rightarrow$  ESS  $\rightarrow$  Travel Reimbursements  $\rightarrow$  Manage Business Travel Arrangements and Reimbursements  $\rightarrow$  Concur Travel & Expense Home Page



## **Concur Travel and Expense Home Page**



	Concur Home Page
1	Click on Profile button located on right hand side of Concur Home tab
2	Select and Click Profile Settings to display Profile Options
3	Select and click on Expense Delegates





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Your Information Personal Information Company Information Contact Information Email Addresses Request Settings Request Information Request Delegates	7 a Add Delegate	Dense Del <u>Delegate For</u> Save Delete s are employees who are allow	ved to perform work on t		ssinning pe	missions for Expense and Rec	uud	
Request Preferences Request Approvers		Name	Can Prepare	Can Submit Reports		Can Submit Requests	Can View Receipts	Receives Emails
Favorite Attendees International Travel		Smith, John fakejohn@bu.edu	×		6		×	Ø

\*\* In most cases the above permissions set up should be used in order to ensure your Expense Delegate has the proper access to your profile.

4	Select <b>Delegates</b> to assign an individual(s) to be an Expense Delegate.
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	Information
	Do <u>not</u> select <b>Delegate For</b>
5	Click <b>Add</b> button to locate, search and select the individual(s) you are granting access to your
	Concur Expense profile.
	Information
	Searching by Boston University email address is most efficient
6	Select desired level of permission to be granted by utilizing the available check boxes.
	Options include: Can Prepare, Can Submit Reports, Can Submit Requests, Can View Reports and Receive Emails
	Important
	**Select & check the Receives Email box if you'd like for your Expense Delegate to be
	informed of the status of your submitted report.
7	Click <b>Save</b> button to finalize Expense Delegate set up.

You have assigned permission and access for your new Expense Delegate.