

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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						Policies and Pro Review Travel Po	olicy Page	
						Access a List of	Travel Office Contacts	ting

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





	Requests Exp	pense App Center					Help - Profile - Q	
Your Information Personal Information Company Information Contact Information Email Addresses	Exp	Dense Dele les Delegate For	egates					
Request Settings Request Information Request Delegates	Add Save Delete 1 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							
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	V		6	V	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	Soloct Delogates to assign an individual(s) to be an Expanse Delogate
4	Select Delegates to assign an individual(s) to be an Expense Delegate.
	Do not select Delegate For
5	Click Add button to locate, search and select the individual(s) you are granting access to your
Ū	Concur Expanse profile
	Searching by Boston University email address is most efficient
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6	Select desired level of permission to be granted by utilizing the available check boxes.
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	Options include: Can Prepare, Can Submit Reports, Can View Receipts, Receives Emails,
	Can Approve, Can Approve Temporary, Can Preview for Approver, Receives Approval 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
	Delegate to be informed of the status of your submitted report.
7	Click Save button to finalize Expense Delegate set up.

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