

CONCUR EXPENSE Manual: Adding an Expense Delegate

The expense role needs to be assigned to both the assistant and the employee prior to adding an expense delegate.

Log into MySLU, click on the Tools tab, then click on the Cliqbook & Concur green suitcase icon.

Once in Concur, click on the PROFILE tab. Then on the left hand menu under the Expense Settings section, click the EXPENSE DELEGATES link.

Profile Options - Microsoft Internet Explorer provided by Saint Louis University

Address https://app2.outtask.com/profile/profile_user.asp

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My Concur Travel Expense Reporting Administration **Profile** Help Log Out

Personal Information Change Password System Settings Concur Mobile Registration Travel Vacation Reassignment System E-Mail Settings

My Profile

Select one of the following to customize your user profile.

Your Information

- Personal Information
- Company Information
- Contact Information
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Expense Settings

- Expense Information
- Bank Information
- Expense Delegates**
- Expense Preferences
- Expense Approvers
- Favorite Attendees

Other Settings

- E-Receipt Activation
- System Settings
- Change Password
- Privacy Statement
- System E-mail Settings
- Travel Vacation Reassignment
- Concur Mobile Registration
- I'm Assisting...

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.

Travel Vacation Reassignment
Going to be out of the office? Configure your backup travel manager.

Expense Delegates
Delegates are employees who are allowed to perform work on behalf of other employees.

System E-Mail Settings
Change parameters for automated system E-Mails.

Concur Mobile Registration
Set up PIN to access Concur Mobile on your Blackberry or Windows 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 Preferences
Carrier, Hotel, Rental Car and other travel-related preferences.

Bank Information
Bank Information

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.

Change Password
Change your password.

Done Internet

Click 'Add Delegate' and start typing in first or last name of employee to add. Once name appears in list, highlight and select it.

Once name appears, check the boxes for the roles you would like this person to have access to for you. Click the 'Save' icon.

Expense Delegates

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address or logon id

<input type="checkbox"/>	Name	Can Prepare	Can Submit	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
<input type="checkbox"/>	Bauman, Sara sbauman4@slu.edu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>