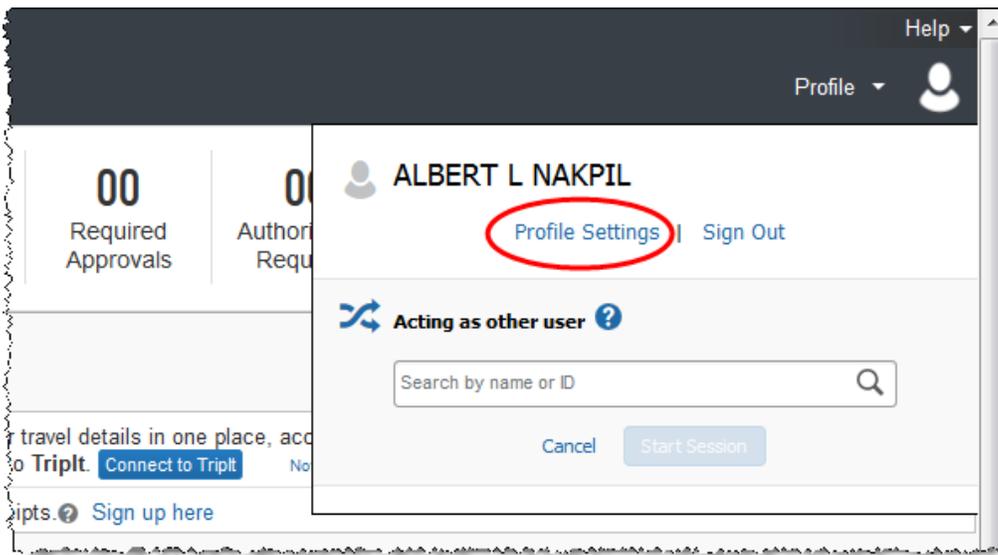


How to Assign Delegates in ERS

Delegates can be assigned to create Expense Reports in ERS for employees. The traveler (employee) can designate their own delegates using the following instructions.

- Go to **ers.psu.edu** and click on **Login to Concur**.
- In the ERS website, click on **Profile** in the Concur Menu bar (upper right corner of screen) and select **Profile Settings** in the dropdown window.



- In the Profile Options screen, click on **Expense Delegates**

Profile Options

Select one of the following to customize your user profile.

<p>Personal Information Your home address and emergency contact information.</p> <p>Company Information Your company name and business address or your remote location address.</p> <p>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.</p> <p>E-Receipt Activation Enable e-receipts to automatically receive electronic receipts from participating vendors.</p> <p>Travel Vacation Reassignment Going to be out of the office? Configure your backup travel manager.</p> <p>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.</p>	<p>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?</p> <p>Contact Information How can we contact you about your travel arrangements?</p> <p>Setup Travel Assistants You can allow other people within your companies to book trips and enter expenses for you.</p> <p>Travel Profile Options Carrier, Hotel, Rental Car and other travel-related preferences.</p> <p>Expense Delegates Delegates are employees who are allowed to perform work on behalf of other employees.</p> <p>Mobile Registration Set up access to Concur on your mobile device</p>
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- The Expense Delegates screen will list your delegates. Click on the **Add** button and type the name of the person that you would like to add as your delegate in the search field. As you type information into the field, names will pop in. Select the name you would like to be your delegate and the name will be appear in your list of delegates. (You aren't done yet!)
- Click in the **Can Prepare** box and a check with appear in it and the **Can View Receipts** box. You can also choose for this delegate to receive copies of the emails you receive from ERS.
- Select **Save** before you leave this window to finish the process.

Note: The employee must add their delegates. Someone who needs to act as a delegate is not able to initiate the process of becoming a delegate. Only after the delegation has been made by the employee can the delegate act on their behalf.