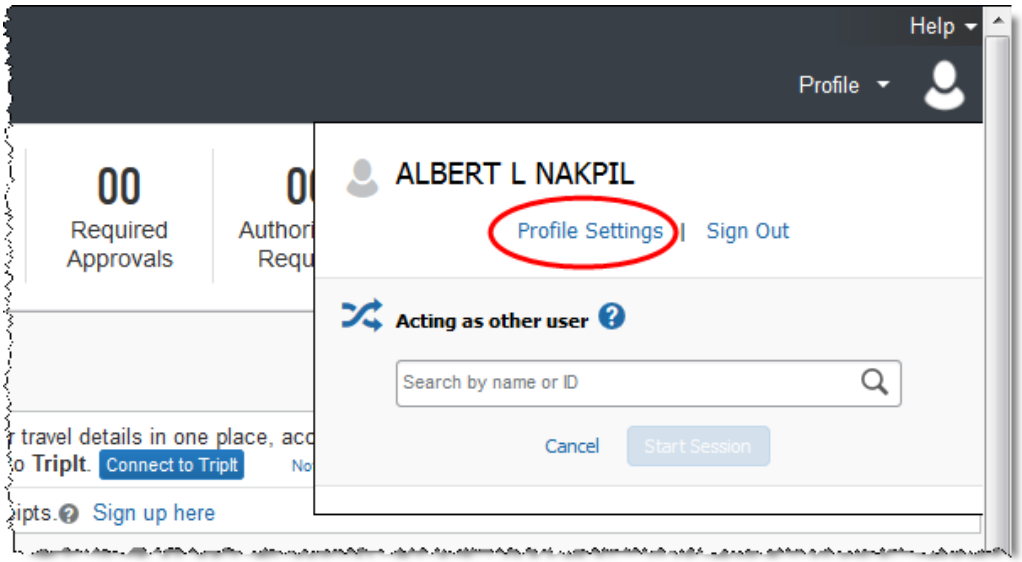
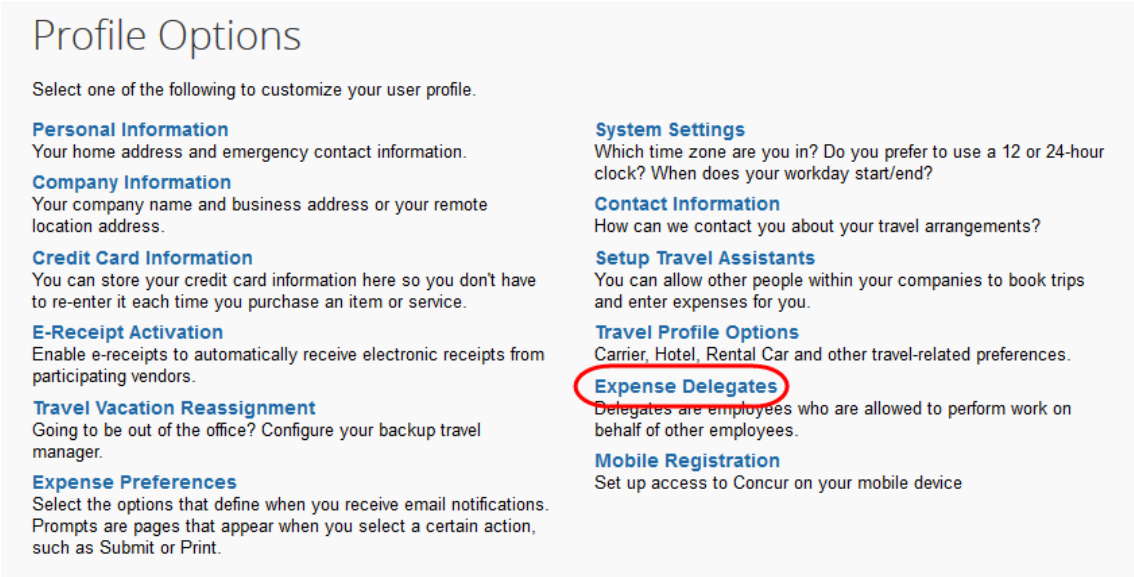
How to Assign Delegates in ERS

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**



- 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.