

# Section 6: Update Your Expense Profile

## Step 1: Review Your Expense Settings

### How to...

1. In the left-hand navigation, in the **Expense Settings** section, click **Expense Information**.

### Additional Information

The **Expense Information** page is read-only. If the information needs to be changed, contact your site administrator.

## Step 2: Add a Delegate

### How to...

2. In the **Expense Settings** section, click **Expense Delegates**.

### Additional Information

The **Expense Delegates** page appears.

From this page, you will give other Expense users the ability to prepare, submit, approve, view receipts, approve reports, or receive emails on your behalf.

Click **Add Delegate**.

In the **Search by employee name, email address or logon id** field, type the last name of the delegate you wish to add.

As you begin to type the name, Expense provides a list of users to select from.

Click the name of the delegate from the list.

Click **Add**.

Select the appropriate task checkboxes.

The delegate can only perform the tasks you select. A delegate will need to be an approver in order to approve reports on your behalf.

To add additional delegates, repeat steps 2-6.

Click **Save**.

You can see if others have added you as their delegate by clicking the **Delegate For** tab.

The screenshot shows the 'Expense Delegates' page. On the left is a navigation menu with sections: 'My Profile', 'Your Information' (Personal Information, Company Information, Contact Information, Emergency Contact, Credit Cards), 'Travel Settings' (Travel Preferences, International Travel, Frequent-Traveler Programs, Assistants/Arrangers), and 'Expense Settings' (Expense Information, Expense Delegates, Expense Preferences, Expense Approvers, Favorite Attendees). The main content area has tabs for 'Delegates' and 'Delegate For'. Below the tabs are 'Add', 'Save', and 'Delete' buttons. A text box explains: 'Delegates are employees who are allowed to perform work on behalf of other employees.' Below this is a table with the following data:

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails
<input type="checkbox"/>	Calnan, Brenna brennac@concur.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Section 6: Update Your Expense Profile (Continued)

### Step 3: Select Expense Preferences

#### How to...

3. In the **Expense Settings** section, click **Expense Preferences**.

In the **Send email when** section, select the applicable checkboxes.

In the **Prompt** section, select the applicable checkboxes.

In the **Display** section, select the applicable checkboxes.

Click **Save**.

#### Additional Information

From this page, you can specify when you will receive email notifications and prompts.

In this section, you determine when you will receive email notifications.

In this section, you determine when Expense will prompt you for further action.

You will see this option only if your company is using travel allowances.

The screenshot shows the 'Expense Preferences' dialog box with a blue header and a white background. At the top left are 'Save' and 'Cancel' buttons. Below the header is a blue bar with the title 'Expense Preferences'. Underneath is a text box: '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.' The dialog is divided into three sections: 'Send email when...' with six checked checkboxes, 'Prompt...' with three checkboxes (two unchecked, one checked), and 'Display...' with one unchecked checkbox.

Section	Option	Status
Send email when...	The status of an expense report changes	Checked
	New company card transactions arrive	Checked
	Faxed receipts are successfully received	Checked
	An expense report is submitted for approval	Checked
	The status of an authorization request changes	Checked
	An authorization request is submitted for approval	Checked
Prompt...	For an approver when an expense report is submitted	Unchecked
	For an approver when an authorization request is submitted	Unchecked
	To add company card transactions to report	Checked
Display...	Make the Single Day Itineraries page my default in the Travel Allowance wizard	Unchecked

### Step 4: Review Expense Approvers

#### How to...

4. In the **Expense Settings** section, click **Expense Approvers**.

Review your **Expense Approvers**.

#### Additional Information

If your company allows you to select your Approver, type all or part of the approver's name in the **Search by...** fields by, select the appropriate person, and then click **Save**.

If your company does not allow you to select your approver, verify that the listed approver is correct. Notify your system administrator for any needed corrections.

# Section 6: Update Your Expense Profile (Continued)

## Step 5: Add Favorite Attendees

### How to...

5. In the **Expense Settings** section, click **Favorite Attendees**.

Click **New Attendee**.

Select the **Attendee Type** from the list.

Enter the **Last Name** of the attendee.

Enter the **First Name** of the attendee.

Enter the **Attendee Title**.

Enter the attendee's **Company**.

Click **Save**.

### Additional Information

The **Favorite Attendees** page appears, which allows you to add, edit, or delete frequently-used attendees.

If you need to add more than one attendee, click **Save & Add Another**.

Your favorite attendees list is also updated based on attendees you add to your expense reports.

The screenshot displays the 'Favorite Attendees' interface. At the top, there are tabs for 'Attendees' and 'Attendee Groups'. Below the tabs is a search bar with the text 'Find every attendee where' followed by dropdown menus for 'Last Name' and 'Begins With', and a 'Go' button. To the right of the search bar is an 'Advanced Search' button. Below the search bar are three buttons: 'New Attendee', 'Edit', and 'Delete'. The main content area is a table with the following columns: 'Attendee Name', 'Attendee Title', 'Company', 'Attendee Type', and 'Annual Total'. There are two rows of data:

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	Annual Total
<input type="checkbox"/>	<a href="#">King, Susan</a>			This Employee	\$0.00
<input type="checkbox"/>	<a href="#">Smith, Anne</a>			Business Guest	\$0.00

At the bottom of the page, there is a pagination bar showing 'Page 1 of 1' and navigation icons.