

SETTING UP YOUR EMBURSE PROFILE

1. **Login to:** Single Sign On (<https://sso.tamug.edu>)
2. **Select:** Emburse Expense (Chrome River).
3. **Select:** Click Your name (upper right corner), “View Profile”, click “See more”.
4. **Verify:** pre-loaded content is correct. It should match the photo ID you will be using while traveling.
5. **Complete remaining requirements, Personal Settings, Preferences Settings.**
6. **Click the "Delegate Settings" header on the left-hand navigation,**
Select: "Add New Delegates" to set up delegates (assists with post-travel activities). You may list as many as you want.

For IQSE sponsored travel purposes please list TENG MA and YASAWATHIE RATHNAYAKA as your delegate so they might be able to prepare (i.e., edit/correct your entries), view (i.e., review), and receive information (i.e., if there are problems) and approval emails (i.e., to know an expense has been paid) related to your expense reports.

E.g., add Mr. Ma as delegates to your account:

- **Click:** "Add New Delegate"
- **In the box type:** "Teng Ma" and select "TENG, MA" from the list of names which appears.
- **Once selected, the delegates name will appear in “My Delegates” box in your Delegate Settings.**

Expense Reports can only be "submitted" by employees themselves and so an email will be sent to the traveler once the delegate has approved the expense report to let them know it can be submitted.

7. **Click the "Notification Settings" header on the left-hand navigation,** to set up preferences (e.g., email options),

please check at least the boxes under Section entitled “Expense Report Notifications” for “Expense Report Assignment”, and under “Pre-Approval Notifications” for “Pre-Approval Approval”, so that IQSE will know when the traveler has submitted Pre-Approval and Expense reports for approval. Otherwise you will need to email tengma@tamug.edu so Mr. Ma will know documents have been

submitted for approval.

Additional user (e.g., more Email Notifications) settings, can be selected for your convenience, e.g., select “Expense Report Returned” so that you receive emails when your expense report is returned by an approver and you can make changes promptly.

8. To add mobile access via apps for iPhones, and Android devices, click the menu symbol "≡" on the upper left corner, then click “Dashboard”. At the bottom of the right-side panels, there are “MOBILE APPLICATIONS AND TOOLS”. You will need to type in your tamu.edu email and it will redirect to Texas A&M central authentication system for you to login.

This will allow you to take pictures of receipts while in travel status and directly upload them into your Emburse profile for easier processing of receipts when you go to complete your Expense report following your trip as well as help to ensure maximum reimbursement by avoiding the lost receipt issue (e.g., food receipts).