Travel and Expense Reimbursement
Creating Expense Reports as a Delegate

- Log in to your Concur profile

Begin Delegate Session
- On the Concur home page at the top right, click Profile.
- In the section Acting as other user, use the drop-down menu to select the person you wish to delegate for.
  - If you are a delegate for more than 10 people, you will have to type their name in the search bar.
  - If you cannot find a specific user, you may not be assigned as their delegate yet.
- Click Start Session.
- When the screen refreshes, the Profile drop-down will change to Acting as, followed by your delegator’s name. The icon will change to green and show two person icons.

Create or Update Expense Report
- Create or update expense reports on behalf of your delegator.

Notify Delegator to Review Report
Delegates can create and modify expense reports on behalf of their delegator, but they cannot submit reports for approval. Expense reports must be submitted by the individual who incurred the expense.
- When the report is ready for your delegator’s review, click Notify Employee.
  - An email will be sent to your delegator notifying them of the expense report pending their review.
  - On the Expense page, a blue checkmark icon will appear next to the report name ready for their review.

Recall a Report — Mark as Not Complete
After you click Notify Employee, the button will change to Mark as Not Complete.
- As a delegate, click Mark as Not Complete to recall the report if you need to make a change.
- On your delegator’s Expense page, the blue checkmark icon will disappear from the report name.
- As a delegate, after clicking Mark as Not Complete, you will see the button change to Notify Employee.
- After you correct the report and save your changes, click Notify Employee to notify your delegator to review and submit the report.

End Delegate Session
- When you are finished delegating, end your session.
- At the top right, click the Acting as drop-down.
- Click done acting for others.
- When the screen refreshes, your delegate session will end and you will be back to your personal account.
- The Acting as drop-down will also change back to Profile.

For Concur Support, email ubs-travel-expense-support@buffalo.edu