Travel and Expense Reimbursement
Creating Expense Reports as a Delegate

1. Log into Concur
   • Log into Concur using your credentials.

2. Start Delegate Session
   • At the top of the home page, click Profile (Figure 1).
   • In the section Acting as other user, use the dropdown menu to select the person you wish to delegate for (Figure 1).
     • If you are a delegate for more than 10 people, you will have to type their last name in the search bar.
     • If you cannot find a user, you may not be assigned as their delegate.
   • After selecting a user, click Start Session.
   • When the screen refreshes, the Profile button will change to Acting as, followed by your delegator’s name.

3. Create or Modify Expense Reports
   • Create or modify expense reports on behalf of your delegator.
   • For more information, refer to the tip sheets Creating a New Expense Report and Completing the Expense Report Header.

4. Notify Delegator to Review Report
   • As a delegate, you can create and modify expense reports on behalf of your delegator, but you cannot submit their 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 that the expense report is pending their review.
     • A Ready for Review checkmark will appear on the report.

5. Recall a Report — Mark as Not Complete
   • After clicking Notify Employee, the button at the top of the report will change to Mark as Not Complete.
   • Click Mark as Not Complete to recall the report if you need to make a change.
   • Your delegator will see the Ready for Review checkmark disappear from their report.
   • When you finish making changes to the report, again click Notify Employee to notify your delegator to review and submit the report.

6. End Delegate Session
   • When you are finished delegating, end your session.
   • At the top of the screen, click the Acting as button.
   • Click done acting for others (Figure 2).
   • When the screen refreshes, your delegate session will end and you will be back to your profile.
   • The Acting as button will change back to Profile.

For travel and expense system support, email ubs-travel-expense-support@buffalo.edu