Create Expense Reports as a Delegate

When delegating on behalf of another user in the system, you can create or modify their expense reports.

1. Log in to Concur

- Log in to Concur using your credentials.

2. Start Delegate Session

- At the top of the home page, click *Profile*.
- In the *Acting as other user* section, use the dropdown menu to select the person you wish to delegate for (Figure 1).

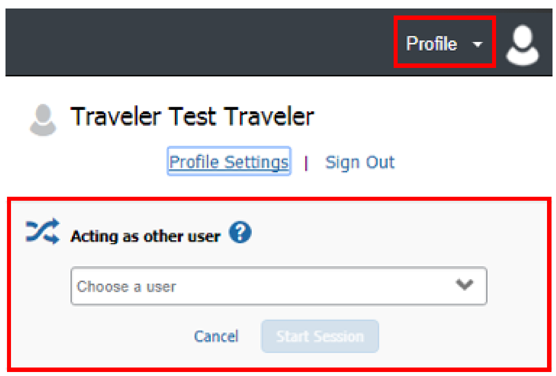

Figure 1

- 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.
    - For more information, refer to the tip sheet *Assign a Delegate.*
- After selecting a user, click *Start Session*.

3. Create or Modify Expense Reports

- Create or modify expense reports on behalf of the individual you are delegating for.
    - For detailed instructions, refer to the tip sheets *Create a New Expense Report* and *Complete the Expense Report Header.*

4. Click Notify Employee When Report is Ready for Review

- When you are finished creating or modifying the expense report, at the top click *Notify Employee*.
- The individual will receive an email notification that the expense report is ready for their review.
- The individual will need to log in to Concur to review and submit the report marked with a *Ready for Review* checkmark (Figure 2).

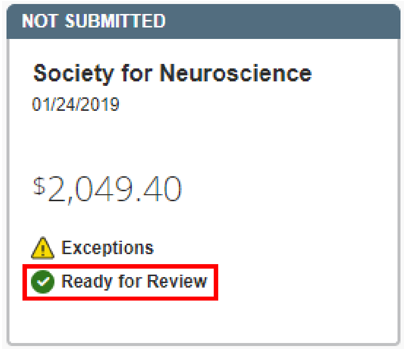

Figure 2

- *Note*: Delegates can create and modify expense reports on behalf of another individual, but cannot submit their reports for approval. Expense reports can only be submitted by the individual who incurred the expense.

5. Click Mark as Not Complete to Edit a Report

- After you click *Notify Employee*, the button at the top of the report will change to *Mark as Not Complete*.
- If you need to edit the report before it is submitted, click *Mark as Not Complete*.
- The individual you are delegating for will see the *Ready for Review* checkmark disappear from the report.
- When finished editing the report, again click *Notify Employee* to notify the individual that the report is ready for their review.

6. End Delegate Session

- When you are finished delegating, end the session.
  - At the top of the page, click the *Acting as* button.
  - Click *done acting for others* (Figure 3).
  - The delegate session will end and you will return to your profile.

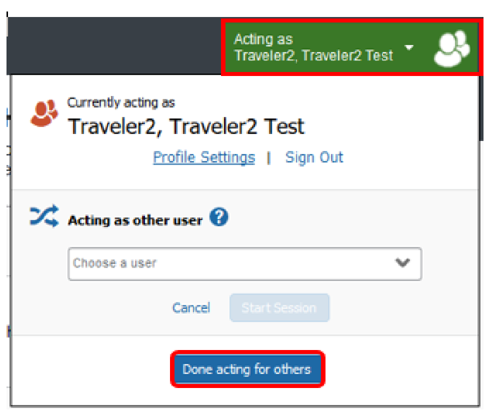

Figure 3

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