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, type in the name of the person you wish to delegate for (Figure 1).

   ![Figure 1](image)

   - If you cannot find a user, you may not be assigned as their delegate.
     o 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.
     o For detailed instructions, refer to the tip sheets Create a New Expense Report and Complete the Expense Report Header.

4. Click Ready for Review When Report is Complete
   - When you are finished creating or modifying the expense report, at the top click Ready for Review. (figure 2)

For travel and expense system support, email ubs-travel-expense-support@buffalo.edu
The individual will receive an email notification that the Report Ready for Submission.

The individual will need to log in to Concur, click on expense, click on report to review.

**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 *Ready for Review*, the button at the top of the report will change to *Not Ready For Review*.
- If you need to edit the report before it is submitted, click *expense report* to change in Manage Expenses screen.
- The individual you are delegating for will see the *Ready for Review* checkmark disappear from the report.
- When finished editing the report, again click *Ready For Review* 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.