Travel and Expense Reimbursement
Creating Expense Reports as a Delegate

- Log into Concur using your credentials.

1. **Begin Delegate Session**
   - On the home page at the top right, 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 (Figure 2).

2. **Create or Update Expense Reports**
   - Create or update 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*.

3. **Notify Delegator to Review the 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 checkmark icon will appear on the report ready for their review.

4. **Recall a Report — Mark as Not Complete**
   - After clicking **Notify Employee**, the button at the top right of the report 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.
   - Your delegator will see the checkmark icon 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.

5. **End Delegate Session**
   - When you are finished delegating, end your session.
   - At the top right 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 personal account.
   - The **Acting as** button will change back to **Profile**.

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