Prepare an Expense Report as a Delegate

Situation: You have been assigned by another individual to prepare expense reports on their behalf

**Step One: Sign in as a Delegate to another person’s account**

- Log into Concur as yourself.
- Click on the Profile drop-down at the top right, then click on the “Act on behalf of another user” drop-down menu. Select the name of the individual for whom you are preparing an expense report.
- Click Start Session.
- **NOTE:** If you are a delegate for more than ten people, you will have to type the first few letters of the individual’s name to search for them in the drop-down. If an individual does not appear in your drop-down because they have not yet assigned you as a delegate, please refer to the instructional guide Assign a Delegate.

When the screen refreshes, the Profile drop-down will change to “Acting as” followed by the individual’s name and the single person icon will change to two people, highlighted in green.
Step Two: Proceed to work on an expense report

- Work on the expense report as usual (guides listed below are available for reference)
  
  - Create an Expense Report - Quick Guide
  - Create an Expense Report - Detailed Guide
- Proceed through attaching receipts
- If a receipt is missing, and is over $25, a missing receipt affidavit must be completed by the person who incurred the expense. **A Delegate cannot create the missing receipt affidavit.** Notify the individual that the expense report is ready except for that one missing receipt and provide them with directions on submitting the missing receipt affidavit under the Receipts button of the expense report. For detailed instructions, refer to the instructional guide Missing Receipt Affidavit.

Step Three: Notify individual that Expense Report is ready for review and submittal

- **STOP before submitting.** An expense report must be submitted by the person who incurred the expense.
- On the top right of the expense report there are multiple buttons
  - As a Delegate, you only see Delete Report and Notify Employee. (Submit Report is blocked to ensure that a delegate does not submit on behalf of someone. Each person must submit their own expense report.)
- Click Notify Employee. An email will be sent to the individual, notifying them that there is an expense report waiting for their review and submittal, and a blue checkmark icon will appear next to the report name when you view the list of reports under Expense, All Reports.

Step Four: Return to your own account

- Return to the top of the screen to the “Acting as” drop-down, and click “Done acting as others”.
• When the screen refreshes, you will be back to your own account and the “Acting as” dropdown will change back to Profile.

Special Topic: What is “Mark as Not Complete”?
• After you click the “Notify Employee” button it will change to “Mark as Not Complete”.
• As a delegator, you can click “Mark as Not Complete” if you need to go back and make changes to a report after you have already notified the employee. The blue checkmark icon will be removed next to the report name and the button will change back to “Notify Employee”.
• Fix the report and save your changes.
• Click “Notify Employee” again.
• A new email will be sent to the individual incurring the expenses, asking them to submit the report, and the blue checkmark icon will appear next to the report name when you click on Expense, All Reports.