Acting as a Delegate
in Concur

Overview:

In Concur, delegates can perform a variety of tasks on behalf of another user who has assigned them this permission, including creating travel Requests and Expense Reports.

This guide provides instructions on how to create Requests and Expense reports as a delegate for another person. Specifically, it will cover:

- How to sign in as another user
- Differences in the Request and Expense Report process when acting as a delegate
- How to return to your own account

Note: Remember, delegates are different from “travel assistants/arrangers”. Travel assistants/arrangers can be assigned to book travel on behalf of another user, whereas delegates do not have this permission. Likewise, travel assistants/arrangers cannot create Requests or Reports for another user. A person would have to assign another individual as both a delegate and a travel assistant/arranger in order for them to do it all.

Step 1: Sign in as a Delegate for Another User:

1. Log into Concur with your own account credentials.
2. Click the Profile button toward the top right of the screen.
3. Click the Acting as Other User drop-down menu and select the name of the person for whom you will be performing Request or Expense Report functions.
   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, it is usually because that person has not yet assigned you as a delegate.
4. Click Start Session

Once the screen refreshes, the Profile drop-down menu will change to “Acting as” followed by the individual’s name, and the single person icon will change to two people, highlighted in green.
Acting as a Delegate in Concur, Continued

Step 2: Perform Needed Functions as a Delegate

You will be able to perform the functions that the user has assigned to you. The different possible delegate functions that can be assigned by a user are as follows:

- Prepare Requests
- Prepare Expense Reports
- Preview Requests/Reports submitted to user for Approval
- May be assigned temporary approval authority.
  - The delegate will have to have Approver status in the system before this can be assigned. This should only be used when an approver will be out of the office for an extended period of time and another person will have to approve Requests and Reports while they are out.

NOTE, DETAILED TRAINING: For DETAILED information on how to prepare or approve Requests or Expense Reports, please refer to the respective training guide for each found on the FSC website: gotu.us/fsc

IMPORTANT, MISSING RECEIPTS: If there is a required receipt missing, the missing receipt affidavit must be completed by the person who incurred the expense. The system will not allow the delegate to create the missing receipt affidavit. Notify the individual that the expense report is ready except for the missing receipt(s). Inform them they will need to click the “Receipts” button when reviewing their report to add the missing receipt affidavit before they can submit their report.

Step 3: Notify User that Expense Report/Request is Ready for Review and Submit or Approval

Delegates can create and modify expense reports on behalf of another user or review submitted reports/requests on behalf of an approver, but they are not able to submit the reports to the Approval process or actually approve for the approver. An expense report/request or approval must be submitted by the person who incurred the expense or is responsible for approving.

- When the expense report/request is ready to be reviewed and submitted or approved by the person for whom you are acting as a delegate, click **Notify Employee** (red button toward the top-right of the screen)
  - An email is sent to the user, notifying them that there is an expense report/request waiting for their review and submittal.
  - A green checkmark icon appears next to the report name when viewing a list of reports on the Expense page (or Requests on the Requests page, or Approvals on the Approvals page).

NOTE, RECALLING A REPORT/REQUEST AS A DELEGATE: A delegate can recall a report after submitting to the user for review is they realize any changes need to be made before the user submits it. The “Notify Employee” button will have changed to “Mark as Not Complete” once you notify the employee. Just click “Mark as Incomplete,” make your changes and Notify User again.
Acting as a Delegate in Concur, Continued

Step 4: Return to Your Own Account

When you have completed all of your tasks on behalf of another user for whom you are a delegate, you can easily return to your own account:

1. Click the green Acting as button (toward the top-right of the screen)

2. Click Done acting for others. When the screen refreshes you will be back to your own account and the Acting as button will change back to Profile.