Overview

In Concur, approval delegates are able to review and approve expense reports on behalf of another Approver.

This Guide provides instructions on how to approve an expense report as a delegate for someone else. Specifically, it will cover how to sign in as another Approver, a brief review of approving expense reports, and lastly, how to return to your own account.

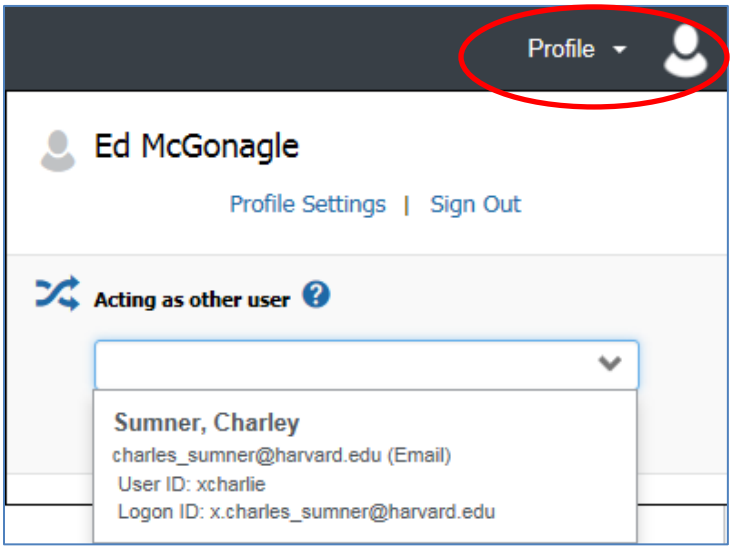
Step 1: Sign in as a Delegate for Another Approver

1. Log into Concur under your account.
2. Click the **Profile** button at the top right.
3. Click the **Acting as Other User** drop-down menu and select the name of the person for whom you are acting as an approval delegate.

   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 they have not yet assigned you as a delegate.

   For more information on how to assign a delegate, please refer to the *Assigning Approval Delegates* work instruction at travel.harvard.edu/concur-training.

4. Click **Start Session**.



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.

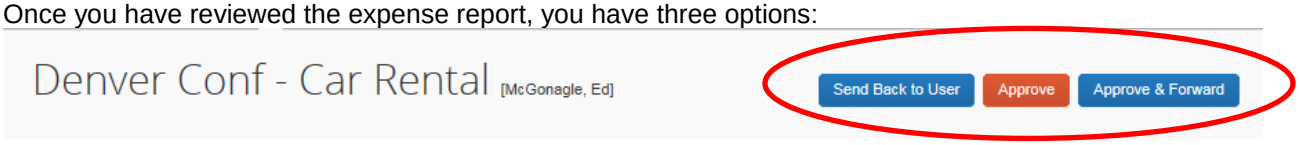
Step 2: Review Expense Report

NOTE: For detailed instructions on approving an expense report, please refer to the *Approving an Expense Report* work instructions located at: travel.harvard.edu/concur-training

1. Review the report header information, including:
    - Report Name
    - Business Purpose
    - Default account coding for the report
        - If necessary, account coding can be changed at the individual expense level.
2. Review any exceptions, and determine whether they have been addressed.
3. Review expense details, and ensure they comply with University and TUB-specific policies.
4. Confirm receipts (or missing receipt affidavits) are attached to any expenses over $75.

Step 3: Approve or Reject Expense Report

Once you have reviewed the expense report, you have three options:

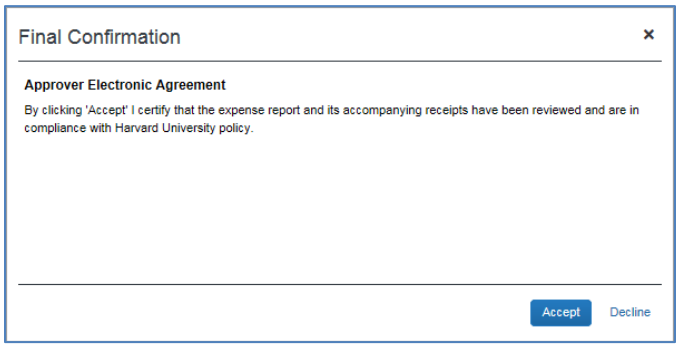


Send Back to User

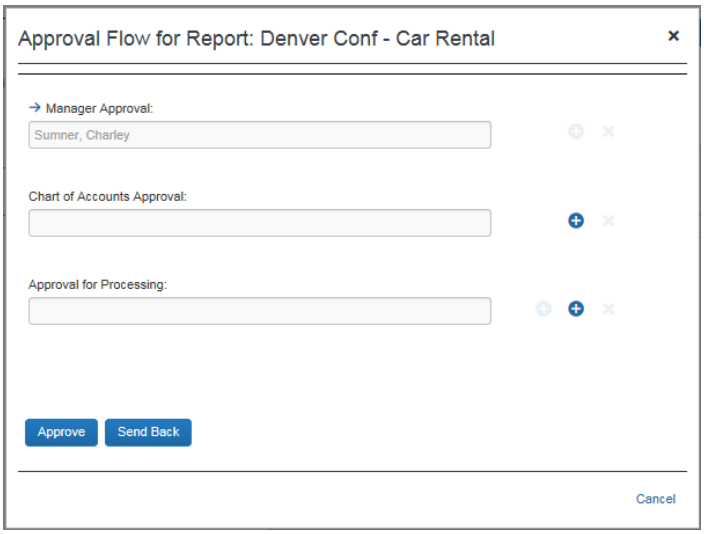
1. Select the **Send Back to User** button if there is a problem with the expense report such as a missing receipt, unallowable expense, or need for further justification.
2. In the popup box, give a clear description of the issue.
3. Click **OK**.

Approve

1. Click the **Approve** button
2. Read the agreement and click **Accept** or **Decline**.



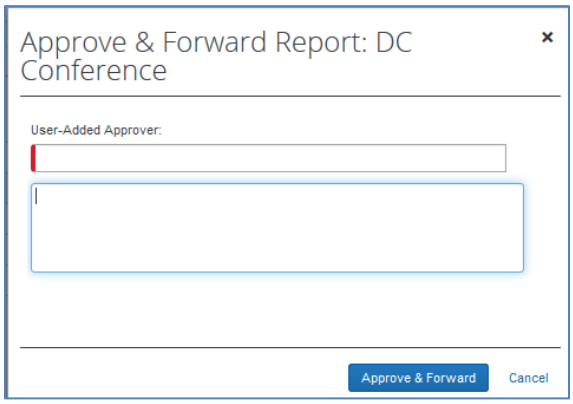
3. Confirm the Approval Flow, and make any necessary changes.



4. Click **Approve**. The report is sent to the next approver, if one exists in the workflow, or to the back office for reimbursement.

Approve & Forward

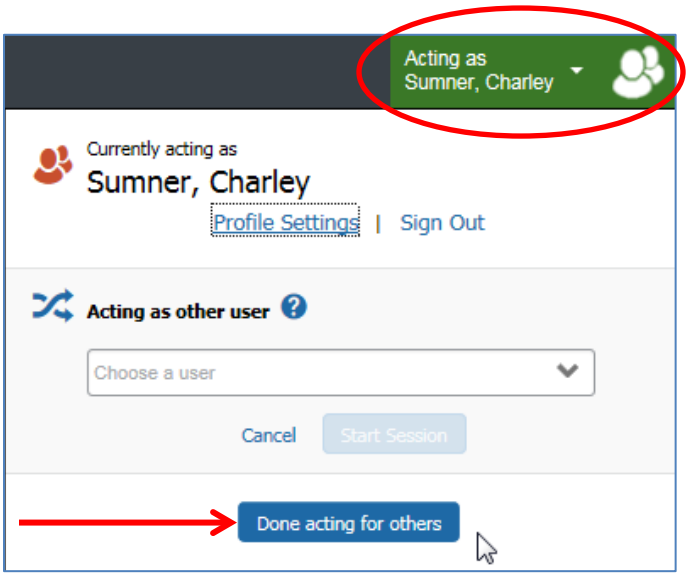
1. If you want to add an additional approver, select the **Approve & Forward** button.
2. In the **User-Added Approver** field, enter the name of the approver you want to add. When their full name appears in the list, click on it.
3. Click **Approve & Forward**
4. Read the agreement and click on the appropriate answer.
5. Clicking **Accept** routes the report to the approver you added to the workflow.



Step 4: Return to Your Own Account

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

1. Click the **Acting as** button.
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**.



Resources

Quick Reference Guides and Online Tutorials

Quick Reference Guides provide step-by-step instructions on a number of common tasks in Concur, and online tutorials present a video walk-through of how to perform various tasks and procedures within the system. Both the Guides and online tutorials are available at: travel.harvard.edu/concur-training

Concur Support

24 hour support is available through the Concur Support Desk at 866-793-4040. You can also access the Concur Support Portal within the system by clicking the **Help** menu, and then selecting **Contact Support**.