Overview

In Concur, delegates are able to perform a number of tasks on behalf of another user, including creating new expense reports.

This guide provides instructions on how to create an expense report as a delegate for someone else. Specifically, it will cover:

- How to sign in as another user
- Main differences in the expense reporting process when acting as a delegate
- How to return to your own account

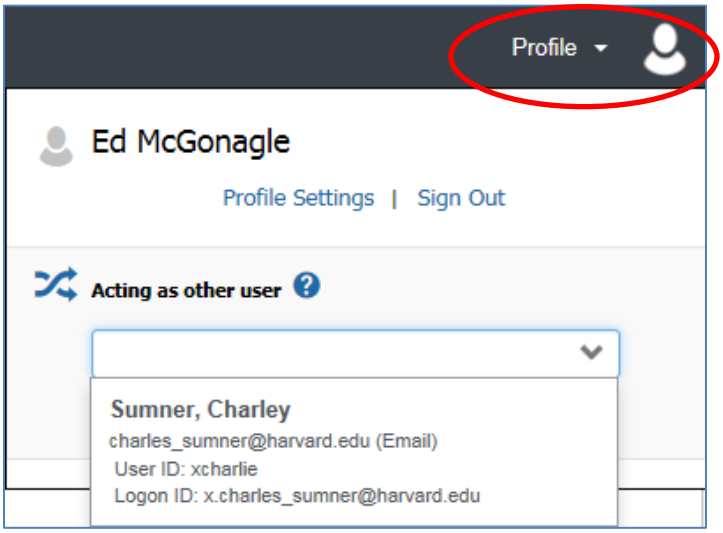
Step 1: Sign in as a Delegate for Another User

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 preparing an expense report.

   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 a Delegate* 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: Create/Update Expense Report

NOTE: For detailed instructions on creating an expense report, please refer to the *Creating an Expense Report: Detailed Guide* located at: travel.harvard.edu/concur-training

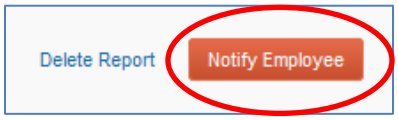
1. Create the report and enter the report header information, including:
    - Report Name
    - Business Purpose
    - Default account coding for the report
        - If necessary, account coding can be changed at the individual expense level.
2. Add expense information, including any itemization of expenses, and allocations across account codes (split-coding).
3. Attach receipts to expenses over $75.

   IMPORTANT: 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 more information, refer to the *Missing Receipt Affidavit* work instructions at travel.harvard.edu/concur-training

Step 3: Notify User that Expense Report is Ready for Review

Delegates can create and modify expense reports on behalf of another user, but they are not able to submit the reports to an Approver. An expense report must be submitted **by the person who incurred the expense**.

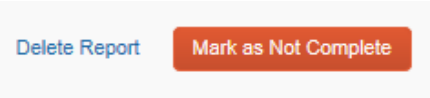
- When the report is ready to be reviewed by the person for whom you are acting as a delegate, click **Notify Employee**.



- When you click **Notify Employee**:
    - An email is sent to the user, notifying them that there is an expense report waiting for their review and submittal.
    - A blue checkmark icon appears next to the report name when viewing a list of reports on the Expense page.

Recalling a Report as a Delegate: Mark as Not Complete

After you click the **Notify Employee** button, it will change to **Mark as Not Complete**.

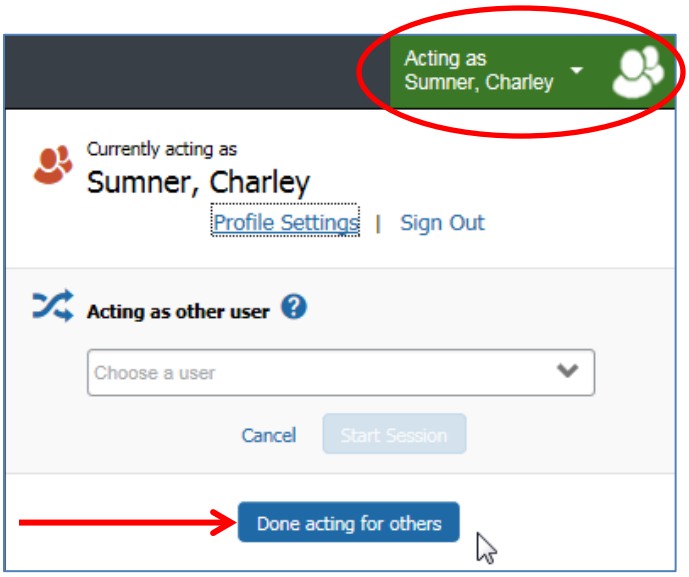


- As a delegate, you can click **Mark as Not Complete** if you need to go back and make changes to a report after you have already notified the employee. The blue checkmark icon will be removed next to the report name and the button will change back to **Notify Employee**.
- After you fix the report and save your changes, click **Notify Employee** again to let the user know that the report is ready for review and submittal.

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**.