CONCUR | WORKING AS A DELEGATE

OVERVIEW
A Delegate is an individual designated in Concur to assist with creating and submitting requests, booking travel, and creating expense reports or approving requests on behalf of another Concur user. Below you will find instructions on how to work as a delegate for another user.

LOGGING IN AS A DELEGATE
1. Navigate to any web browser.
2. Access Concur by clicking on the following link: Concur SSO.
3. Click Profile at the top right corner of the page.
4. Below Profile settings click Acting as other user.
5. Once you have been granted permission to act on behalf of another user, click the Acting as other user dropdown. A list of names displays.
6. Select the name of the person you would like to ‘Act as’ from the list.

NOTE: (1) If you do not see the name you are looking for, type the first few letters of the individual’s name to search for them in the drop-down. (2) If an individual does not appear in your drop-down, it is usually because that person has not yet assigned you as a delegate. (3) If you are a delegate for more than 10 people, you should contact the travel team for additional assistance to have the, added.

TIP: Refer to the How to Add a Delegate reference document for additional details.

7. Click Start Session.

NOTE: 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.

FUNCTIONS OF A DELEGATE
As a delegate, you will be able to perform functions that the user has assigned to you such as:
- View/Modify Concur Profile
- Prepare and submit requests
- Prepare expense reports
- Preview requests or reports submitted to the user for approval
- Temporary or permanent assignment of approval authority.

NOTE: For more information on the delegate functions please refer to the Roles in Concur training document.

MISSING RECEIPTS
If there is a required receipt missing, the missing receipt affidavit must be completed by the traveler that incurred the expense. Concur will not allow the delegate to create the missing receipt affidavit. If there
is a missing required receipt, the delegate must take the follow the steps:

1. Notify the traveler that the expense report is ready except for the missing receipt(s).

2. Inform the traveler they will need to click the Receipts button when reviewing their report to create the missing receipt affidavit before they can submit their report.

   ![Expense Report Screenshot]

   **NOTIFYING USER TO SUBMIT REPORTS**

   Although preparer delegates can create and modify expense reports on behalf of another user, they are NOT able to submit the expense reports for approval. An expense report must be submitted for approval by the traveler whom incurred the expense.

   **NOTE:** The preparer delegate can however click submit to resolve exception messages however the report does not route for approval when submit is clicked by a delegate.

   After preparing an expense report the delegate must take the following steps to notify the traveler when the report is ready for reviewed and submission:

1. At the top right of the page click Submit.

   ![Submit Button]

   After you click Submit while acting as a delegate:

   - The delegate will need to send an email to the user/traveler, notifying them that there is an expense report waiting for their review and submittal.

2. After clicking Submit, the delegate may still make changes before the user/traveler submits it.

   **NOTE:** This is the same process for previewer delegates. They can view the requests and expense reports however they will need to notify the approver outside of Concur via email or phone to login and do the actual approval.

   **SIGNING OUT OF DELEGATE’S ACCOUNT**

   After the delegate has completed all the tasks on behalf of the user, the delegate can return to their own account using the following steps:

   1. Click the green Acting As button at the top right of the page.

   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.

   ![Signing Out of Delegate's Account]

   **ADDITIONAL SUPPORT**

   For help with Concur, contact travel@uconn.edu.

   For additional reference material, refer to https://concurproject.uconn.edu/home/