CONCUR | WORKING AS A DELEGATE

OVERVIEW
A Delegate is an individual designated in Concur to assist with creating and submitting Travel Requests, creating Expense Reports or approving Travel Requests and Expense Reports on behalf of another Concur user. Below you will find instructions on how to work as a delegate on behalf of another user at UConn.

LOGGING IN AS A DELEGATE
1. Navigate to any web browser.
2. Access Concur by clicking on the following link: Concur SSO.
3. Once you have been granted permission to act on behalf of another user, from the Concur homepage, click Profile.
4. Click in the Acting as other user field.
5. Type the travelers name within the Acting as other user field or click the dropdown. When available, a list of names displays.
6. Select the name of the person you would like to ‘Act as’ from the list.

NOTES: (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 them added.

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

8. Click Start Session.

The delegates view will change to display an “Acting as” badge (top right of the view) followed by the traveler’s name, 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 Travel Requests
- Prepare Expense Reports
- Preview Travel Requests or Expense Reports submitted to the user for approval
- Temporary or permanent assignment of Travel Request and Expense Report approval
MISSING RECEIPTS

If there is a required receipt missing, the **missing receipt affidavit** must be completed by the traveler who 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 following 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 drop-down** when reviewing their report to create the missing receipt affidavit before they can submit their report.

NOTIFYING USER TO SUBMIT EXPENSE 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(s).

**NOTE:** The preparer delegate can click submit (within the traveler’s expense report) to resolve any exception messages however the report does not route for approval. Once applicable exceptions are resolved by the delegate, the delegate should email the traveler to advise that the expense report is ready for submission.

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**.

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 Travel 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.

ADDITIONAL SUPPORT

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

For additional reference material, refer to the **Concur Training Reference Material**.