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.

SIGNING IN AS A DELEGATE

1. Navigate to any web browser.
2. Access Concur by clicking on the following: Concur SSO, or navigate directly to the UConn Travel homepage and click the Concur image.
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:

1. View/Modify Concur Profile
2. Prepare and submit requests
3. Prepare expense reports
4. Preview requests or reports submitted to the user for approval
5. 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.

NOTE: This is the same process for previewer delegates. They can view the requests and expense reports however they will need to submit to the approver so they will be notified to go in and do the actual approval.

NOTIFYING USER TO SUBMIT REPORTS

Although previewer 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.

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.

2. When you click Submit while acting as a delegate:
   a. An email is sent to the user, notifying them that there is an expense report waiting for their review and submittal.
   b. A green checkmark icon appears next to the report name when viewing a list of reports on the Expense page.

3. After clicking Submit, the delegate may recall the report if they need to make changes before the user/traveler submits it. The Submit button will change to Mark as Not Complete once you notify the employee.

4. Click Mark as Not Complete to make your changes and Notify User again.

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 https://travel.uconn.edu/.