

**CU Concur Tip: How do I create an Expense Report on behalf of a someone else?**

1 message

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**CU Concur Tip: How do I create an Expense Report on behalf of a someone else?****What is It?**

Concur users can designate their colleagues as Preparer Delegates to create Expense Reports on their behalf. As a Preparer Delegate, you can select to act on behalf of your colleague to create their Expense Report. In addition, you can submit an Expense Report on behalf of a Non-Profiled Payee (e.g., student or guest).

Refer to the [Managing Delegates](#) job aid for details on how to assign Delegates or how to act as a Delegate. Refer to the [Creating an Expense Report](#) job aid for details on how to submit an Expense Report for Non-Profiled Payees.

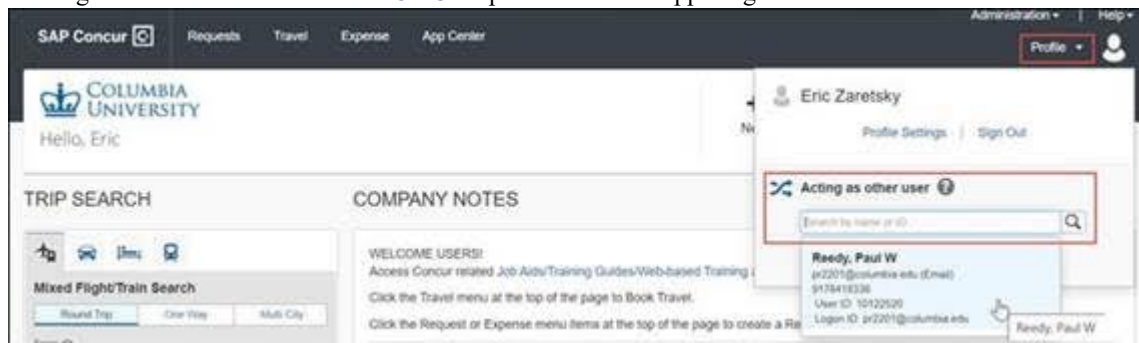
**Who's it for?**

Those who are responsible for creating Expense Reports on behalf of others.

**How do I do it?**

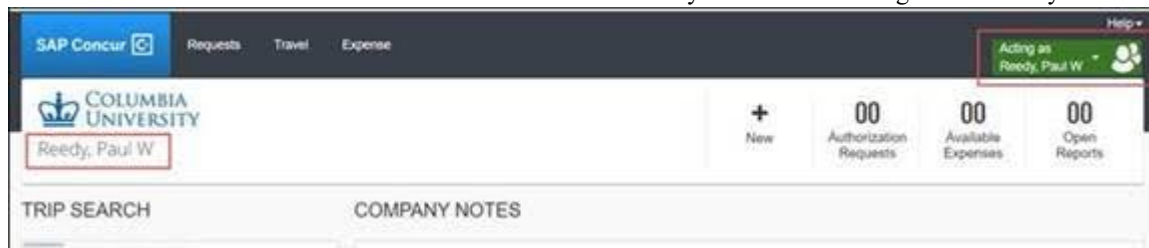
To work as a Preparer Delegate, make sure that your colleague has already set you up as their Preparer Delegate.

1. Login to Concur and click the **Profile** dropdown from the upper right corner.



2. Select **Act on behalf of another user**.
3. Search by name or ID of the colleague. You can use the percent sign (%) to return all names. Only those individuals that have given you Delegate access will appear.
4. Select the matching name.

5. Click **Start Session**. Your Concur screen will indicate that you are now working on behalf of your colleague.



To Submit an Expense Report for Non-Profiled Payee:

1. After Creating A New Report in Concur, click the **Type of Report** dropdown and select **CU Non-Profiled Payee**.

3. Select the **Vendor Type (Employee, Outside Party, Student Employee, or Student Non-Employee)**.
4. Search and select the matching **Vendor Name / ID**. The selected Vendor will receive reimbursement. If the Vendor is not listed, please ensure you have selected the correct Vendor type or initiate a request for the [setup of a new Vendor](#).
5. Complete the remaining required fields and click **Create Report**. If applicable, add the Expense Items submitted by the payee from the [Non-Profiled Payee Travel and Business Expense Worksheet](#)

## Where do I get help?

Please contact the Finance Service Center

<http://finance.columbia.edu/content/finance-service-center>

You can log an incident or request a service via Service Now

<https://columbia.service-now.com>