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

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To: CONCUR-USERS@lists.columbia.edu

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).

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**.

2. Select the **Vendor Type** (Employee, Outside Party, Student Employee, or Student Non-Employee).

3. 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.

4. 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