User guide for delegates submitting a PER claim in Concur
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If you are a delegate for an APUO member who needs to submit an expense report, this guide contains all the information that you need. You will also need to review the “User’s Guide for APUO Members Submitting a PER Claim in Concur,” which explains the system functions in greater detail.

HOW TO ACT AS A DELEGATE

If you are a delegate acting on behalf of another (delegator), you can:

- Make changes that affect only the delegator and do not change your personal information.
- Only access data to complete tasks the delegator has assigned to you, such as:
  
  - preparing expense reports
  - attaching receipts
  - receiving email notification when a document’s status has changed

To work as a delegate:

- Open a Concur session using your own ID and password.
- Click Profile.
- In the Acting as other user field, start typing a name and then you will be able to select the name of the delegator on whose behalf you are working.
- Click Start Session.
- The Acting as other user field should now read Acting as and show the name of the professor you have selected.

1 If these documents do not meet your accessibility needs, please send an email to Human Resources or call 613-562-5832.
You are now officially working on behalf of that person.

**NOTE:** If you can’t see **Acting as other user** when you click **Profile**, the professor has not set you up as a delegate. The professor must do so first.

To return to your own profile:

- Click on **Acting as other user**.
- Select Done **Acting as other user**.
When the screen refreshes, you will be back to your own account and the “Acting as” drop-down will change back to “Profile.”

**How to create an expense report as a delegate**

Proceed by working on the expense report as usual (see *How to Create an Expense Report — Detailed*). Once you have completed all the steps required to create an expense report, you will have the option to **Notify the employee**. As a delegate, you do not have the ability to submit a report for a professor. The professor must be the one that submits the report and electronically agrees that all the expenses are correct and comply with the University policy.

**MISSING RECEIPTS AFFIDAVIT**

A delegate cannot create a missing receipt affidavit. Notify the individual that their expense report is ready except for one missing receipt. If necessary, provide them with procedures on submitting the missing receipt affidavit (See *How to Attach a Missing Receipt Affidavit* in the APUO member user guide to submit a PER claim).

To return to your own profile:
• Click **Acting as**

• Click **Done acting for others**

When the screen refreshes, you will be back to your own account and the “Acting as” drop-down will change back to “Profile.”