

User guide for delegates submitting a PER claim in Concur

Human Resources

613-562-5832 | hrinfo@uOttawa.ca
uOttawa.ca/human-resources



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User guide for delegates submitting a PER claim in Concur

If you are a delegate for an APUO member who needs to submit an expense report, this guide¹ 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

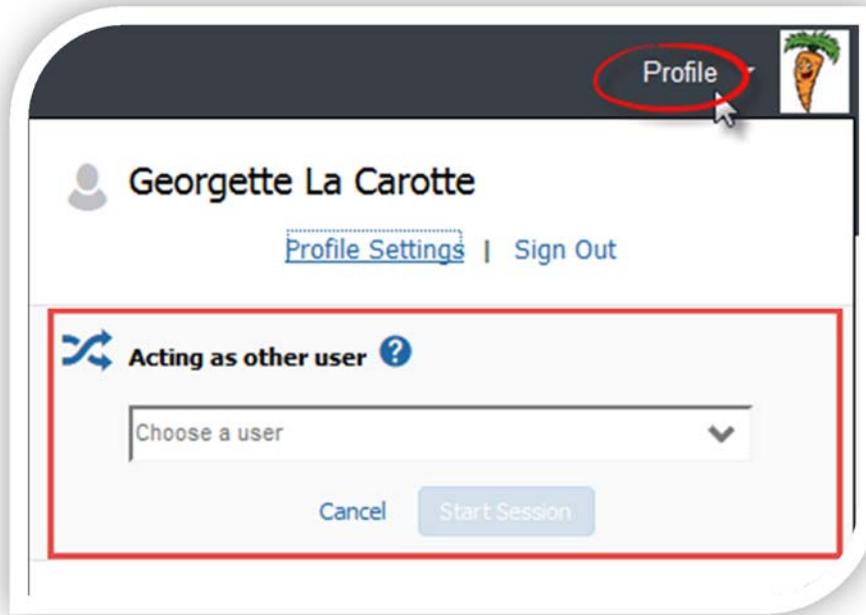
If you are a *delegate* acting *on behalf of* another (delegator), you can:

- 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.

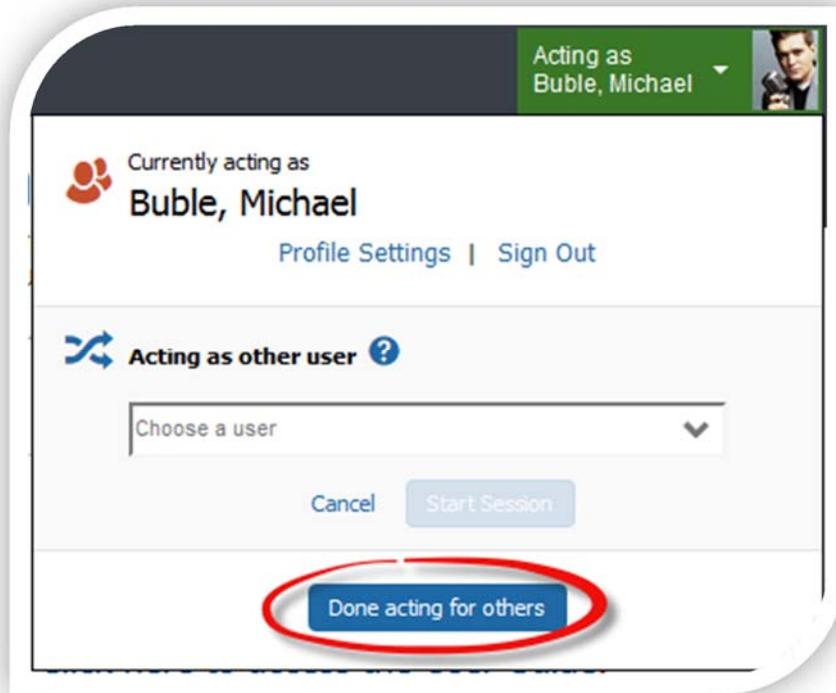


You are now officially working on behalf of that person.

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.”