General user guide to submitting a PER claim in Concur
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General user guide to submitting a PER claim in Concur

This guide is for anyone able to submit a Professional Expenses Reimbursement (PER) claim in Concur. You will find all the information required to access Concur, navigate the home page, update your profile and get help from different resources. Two other guides are available depending on your role: the PER guide - APUO Members Submitting a PER Claim in Concur" and the "User’s Guide for Delegates Submitting a PER Claim in Concur.”

How to log in to Concur

1. Open your web browser
2. Go to the Professional expenses reimbursement page.
3. OR type PER in the search bar on the University home page
4. Select Log in to Concur

System Language Notice: Please note that Concur is an international company, therefore some of the language you may see when using Concur may vary from the language you may be accustomed to (i.e. American spelling/terms, European French).

If these documents do not meet your accessibility needs, please send an email to Human Resources or call 613-562-5832.
5. Use your User ID and Password from Outlook.
Exploring the home page

The home page is the first page you will see after you log in. It includes the following sections that make it easy for you to access all the information you need:
How to set up your profile settings

You can change, confirm and update your user settings in your profile settings. To access this section of Concur, go to Profile > Profile Settings.

We recommend that you go through each element on the left of your Profile Options in order to validate the information. You will find here some of the information that is important for you to update in your profile.
Your information

PERSONAL INFORMATION

Check that all the information that already appears in the boxes (in grey) is correct. You cannot change this information. If information is incorrect, email the Human Resources Benefits sector at hrbenefits@uOttawa.ca.

Note: It is not mandatory to provide personal information such as your home number or information on your travel passport. You will notice that we have entered the university phone number in the Home Phone field since this field is mandatory.

EMAIL ADDRESS

Ensure that you validate at least one email address. To do this, press the Verify button. An email will be sent with a code that you can then enter in the appropriate box.
If you validate more than one email address, you can decide which one you prefer to receive your email notifications.

ADD A DELEGATE
In the Request Delegate section, you can assign a person as your delegate. This person will be able to act on your behalf to prepare and submit requests. The user can be assigned only to tasks that they are allowed to perform. You can also assign multiple delegates, each with different responsibilities.

- Click the Add button.
- To find the name of a person you wish to assign as a delegate, start typing it in the search field.
- When the name appears, click it. It will now appear in the box.
- Select the boxes for the permissions you are giving to the delegate (the activities he or she can do on your behalf).
- Click Save.

Note: You can delegate to multiple people, each with different responsibilities.
NOTE: Delegates can't submit claims — they can only prepare them. Once the documents ready to be submitted, delegates should notify their professors.

The Delegate For tab lets delegates see who is their delegator and the permissions they have been given.
Email notification preferences

EMAIL NOTIFICATION FOR EXPENSE CLAIMS

Expense Preferences is where you can select when to receive email notifications.

Under Prompt..., you can check “For an approver when an expense report is submitted” to be prompted to choose the appropriate approver when submitting an expense report.

NOTE: Your Approver is set by default. If you are planning on travelling, please refer to the E-travel Policy to set up your profile.

Learn how to set up your profile.
HOW TO USE YOUR MOBILE DEVICES WITH CONCUR

To be able to use the mobile applications (Concur or ExpenseIt), you must create a mobile PIN.

Go to your profile settings, under Mobile Registration. Click on Create a mobile PIN.

Once on the Mobile Registration page, enter a new PIN in order to create it. Once you confirm your PIN and click on Set PIN, you will then use this PIN to log into the mobile applications on your mobile device.

If you forget your mobile password, you can access your profile via the web and click the Forgot Mobile Password (PIN) at any time. You will then be asked for your login ID (this is your full email address).
XXX@uottawa.ca, based on your Outlook Exchange Login info). An email will then be sent to you with instructions to follow in order to reset your PIN.
HOW TO USE YOUR EXPENSEIT MOBILE APPLICATION

Turn your receipts into an Expense Report! The ExpenseIt app from Concur makes it even easier by automatically creating, itemizing and categorizing an expense entry, with the receipt image attached.

1. Download the App on your mobile device.
2. Access the application using your Concur user name and your mobile PIN created previously in your profile (see section on How to use your mobile device with Concur).

ACCOUNT SETTINGS

Automatically export expenses to Concur:

ON: Expenses are automatically exported to your Concur account where you can make any necessary modifications.

OFF: Modify your expenses within ExpenseIt before they are sent to Concur

NOTIFICATION

Would you like to be notified once your receipts have been analysed either by e-mail or directly on your mobile device?

*ExpenseIT Pro sends receipts for analysis using a combination of technology and a team that works together to create your expenses from your receipts. Once the receipt has been analyzed, you can make changes if necessary, either in the application directly or in Concur.
TAKING PHOTOS OF YOUR RECEIPTS

Follow these 3 easy steps to quickly submit your expense report:

1. Open the application and take a photo of your receipt or upload the receipt from your receipt gallery
2. Review the image to ensure that it is clear and legible.
3. Click « Use ».
HOTEL EXPENSE ITEMIZATION
Submit your receipts as described above and ExpenseIt Pro will take care of your hotel itemization, separate the taxes, room charges and miscellaneous charges.

ELECTRONIC RECEIPTS
You received receipts via e-mail? Forward them to receipts@expenseit.com. This is the fastest way to attach an electronic receipt such as a hotel receipt.

Now that your expenses have been created, complete your expense report within Concur mobile, or via the web.
Resources

MANY WAYS TO GET ASSISTANCE
You can find information on using the system on the Professional Expense Reimbursement web page:

https://hrdocrh.uottawa.ca/info/en-ca/apuo/expenses-reimbursement.html

You can also find help by clicking on the Support button directly in your user profile.

You will be directed to Concur’s 24/7 support page.

For questions regarding training, you can communicate with us.

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Appendix A: Selecting a FOAP

To search for a fund by fund owner name:

- Click on the drop down menu
- Put the radio button in “text”
- Type an asterisk (*) then start typing the name/text (see below)
- Select your PER account that includes your name