

# General user guide to submitting a PER claim in Concur

## Human Resources

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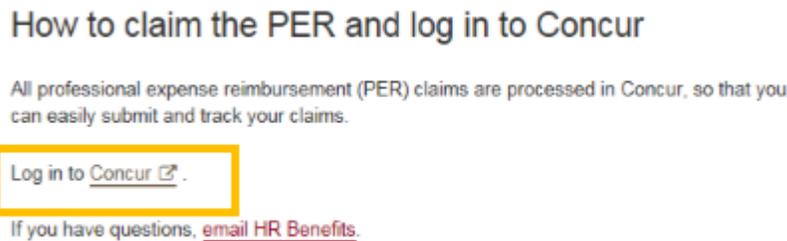
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# General user guide to submitting a PER claim in Concur

This guide<sup>1</sup> 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).

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<sup>1</sup> 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.

uOttawa Shibboleth Login

Connect easily and securely to a variety of services with one simple login.

User ID

@uOttawa.ca

Password

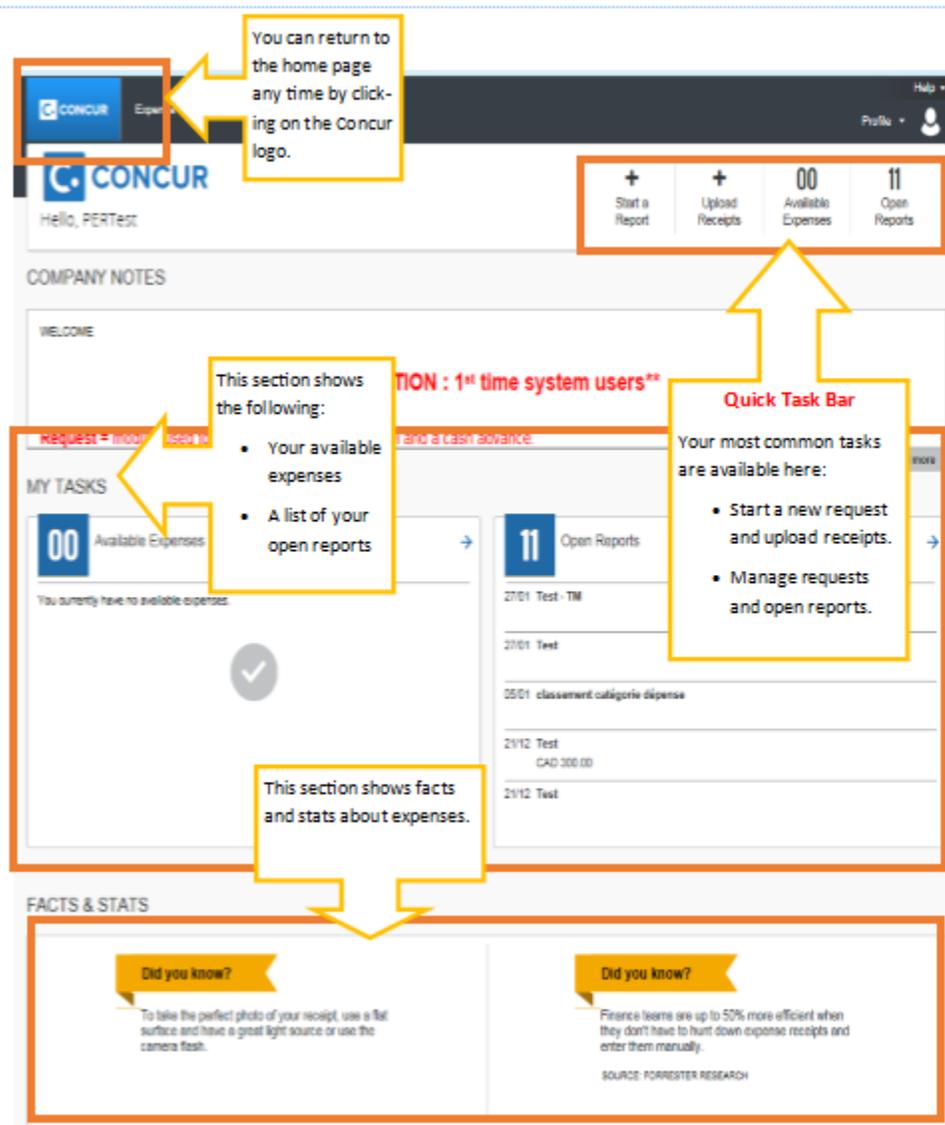
Login

[Can't access your account?](#)

► [Find out how your personal information may be shared.](#)

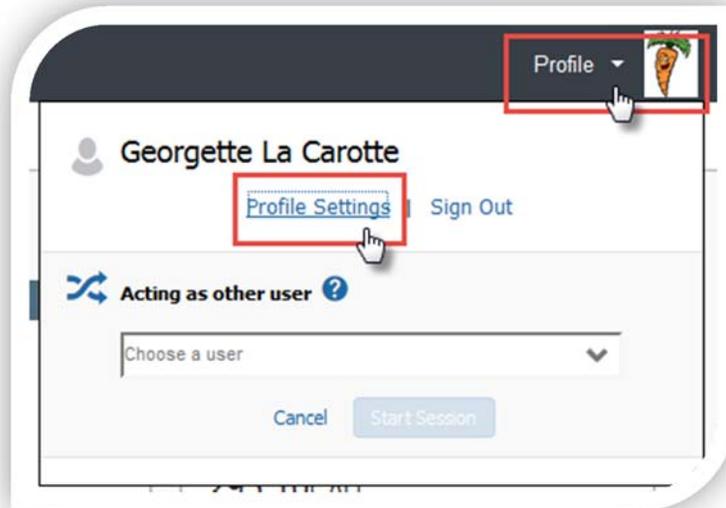
# Exploring the home page

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.

A screenshot of the 'Profile Options' page. On the left, there is a sidebar menu with the following categories and links: 'Your Information' (Personal Information, Company Information, Contact Information, Email Addresses), 'Request Settings' (Request Information, Request Delegates, Request Preferences, Request Approvers, Favorite Attendees, International Travel), 'Expense Settings' (Expense Information, Expense Delegates, Expense Preferences, Expense Approvers, Favorite Attendees), and 'Other Settings' (System Settings, Concur Connect, Change Password, Mobile Registration). The 'Your Information' category is highlighted with a red box. A red arrow points from the bottom of the sidebar towards the main content area. The main content area is titled 'Profile Options' and contains the following sections: 'Personal Information' (Personal Information), 'Expense Delegates' (Delegates are employees who are allowed to perform work on behalf of other employees.), 'Expense Preferences' (Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.), 'Mobile Registration' (Set up access to Concur on your mobile device), 'System Settings' (Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?), 'Request Preferences' (Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.), and 'Change Password' (Change your password.).

# 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](mailto: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.



Enter email address: etravel@uottawa.ca

Contact for Travel Notifications?  
 Yes  No

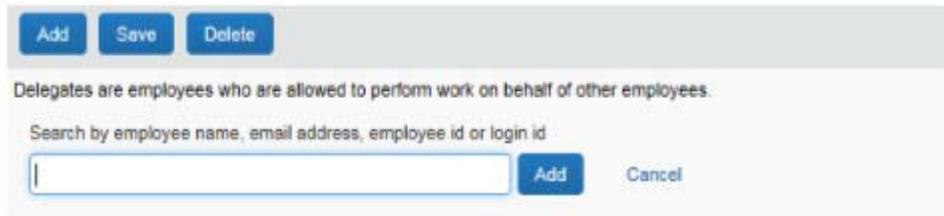
OK | Cancel

## 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.



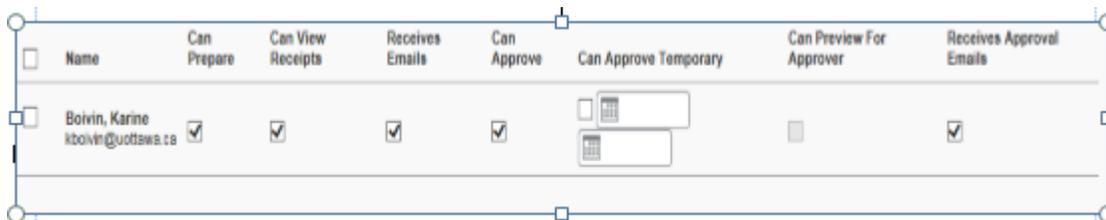
Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

Add Cancel

- 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.

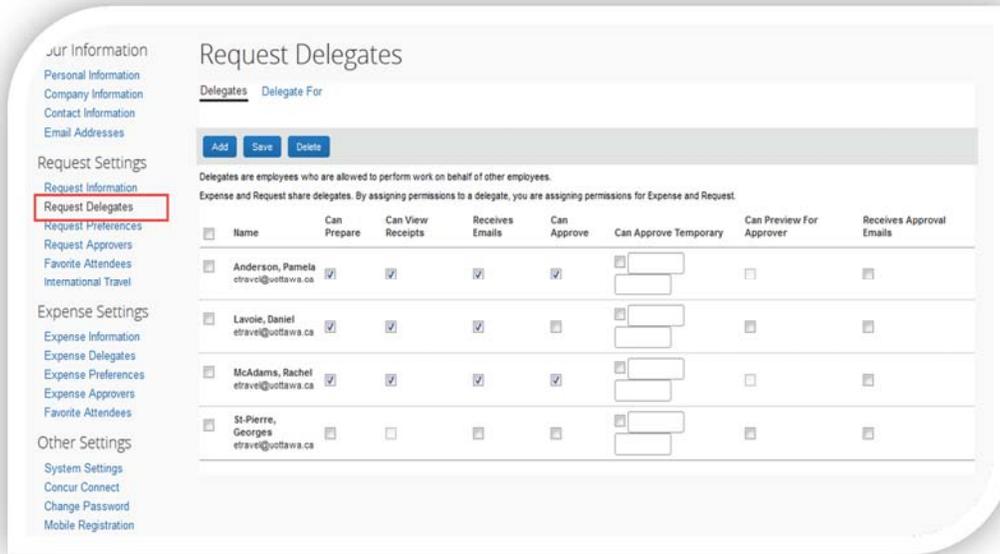


<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	Boivin, Karine kboivin@uottawa.ca	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- 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.

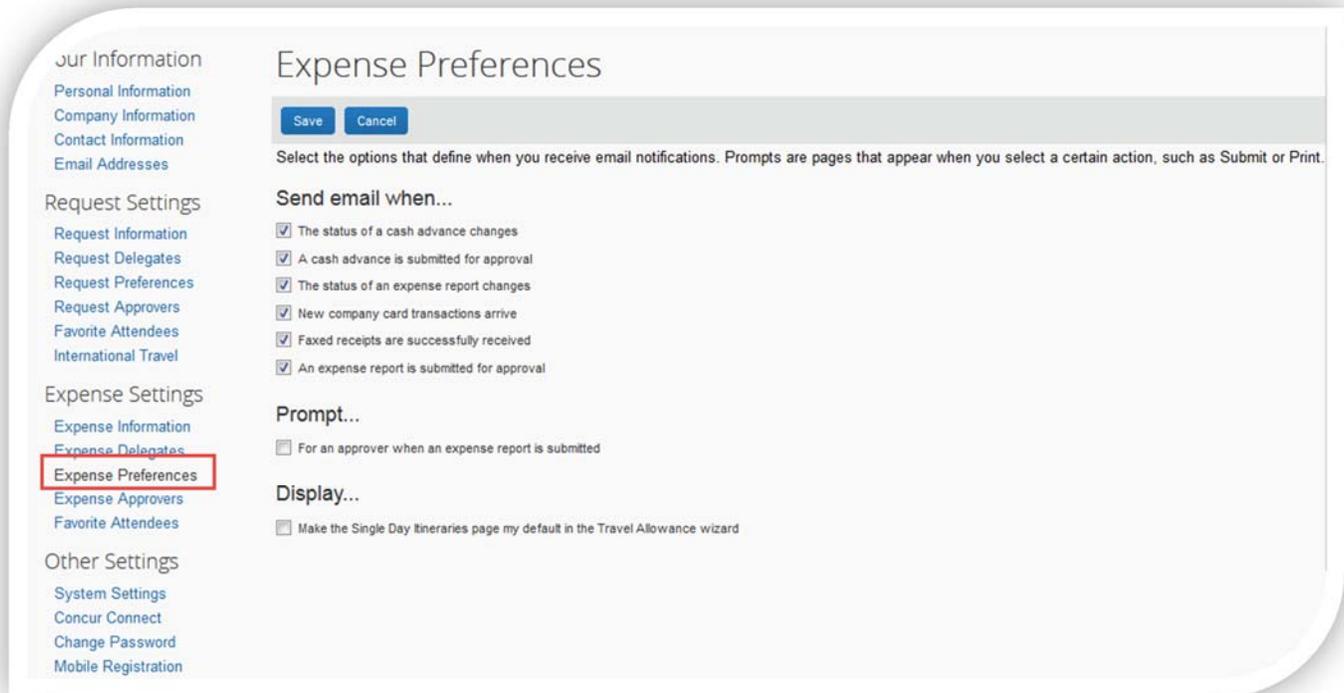
The **Delegate For** tab lets delegates see who is their delegator and the permissions they have been given.

# 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.



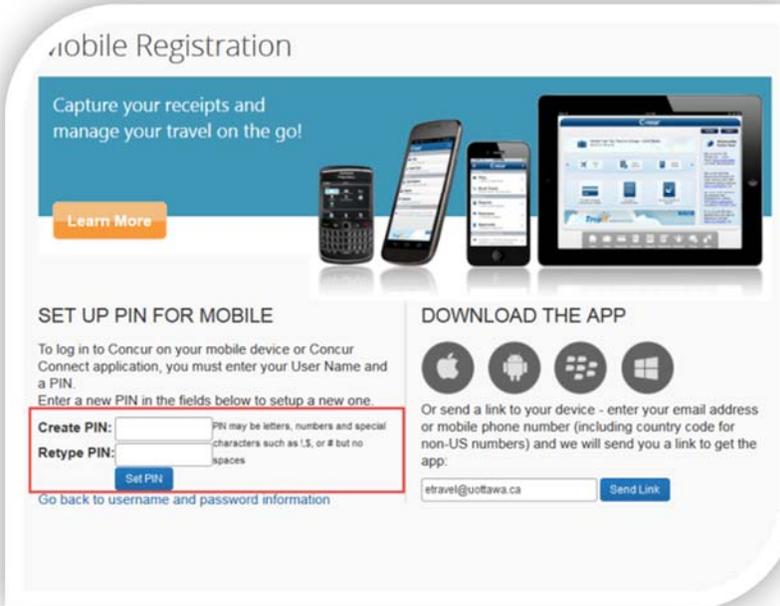
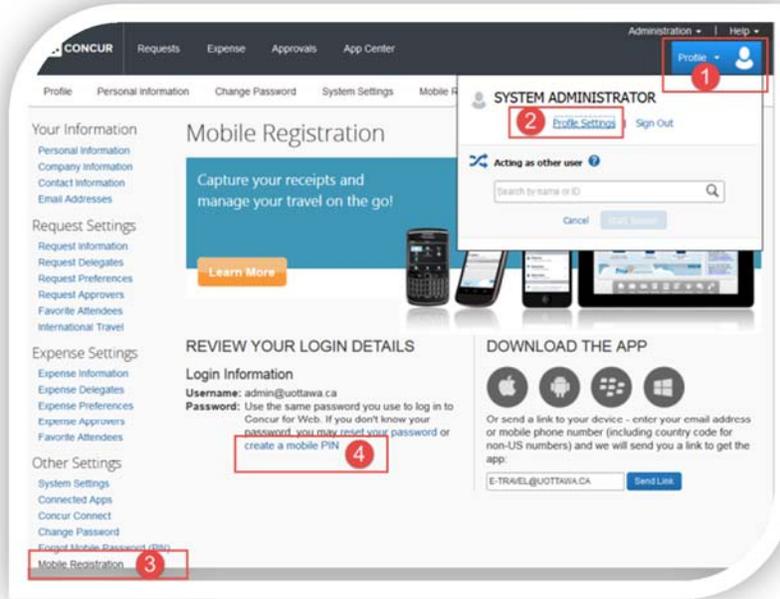
**NOTE:** Your Approver is set by default. If you are planning on travelling, please refer to the [E-travel Policy](#) to set up your profile.

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 Expenselt), 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](mailto: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.

## Forgot your Mobile Only Password (formerly PIN)?

**Forgot your Mobile Only Password (formerly PIN)?**  
Please enter your login ID below and we will send you an email with a link to reset your mobile only password.  
NOTE: This is different from your password. This is a mobile only password for companies that use Single Sign On (SSO) on the Web, but not on mobile.

Login ID :

## 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:*

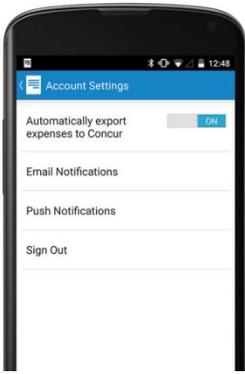
ON: Expenses are automatically exported to your Concur account where you can make any necessary modifications.

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?

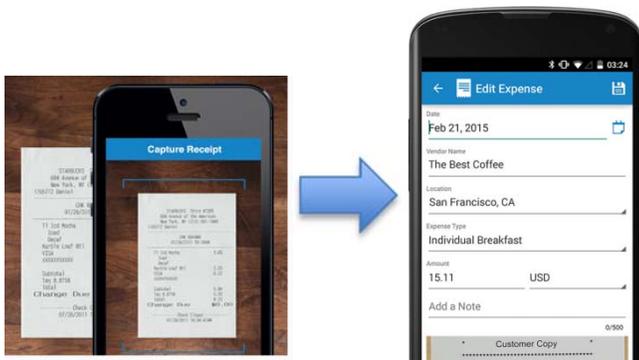
\*ExpenseIT Pro sends receipts for analysis using a combination of technology and a team that works together to create your expenses from your receipts. Once the receipt has been analyzed, you can make changes if necessary, either in the application directly or in Concur.



## 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 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](mailto: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.



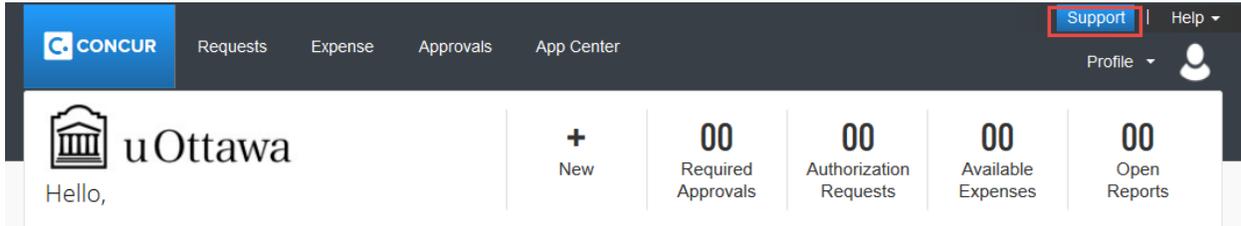
# Resources

## MANY WAYS TO GET ASSISTANCE

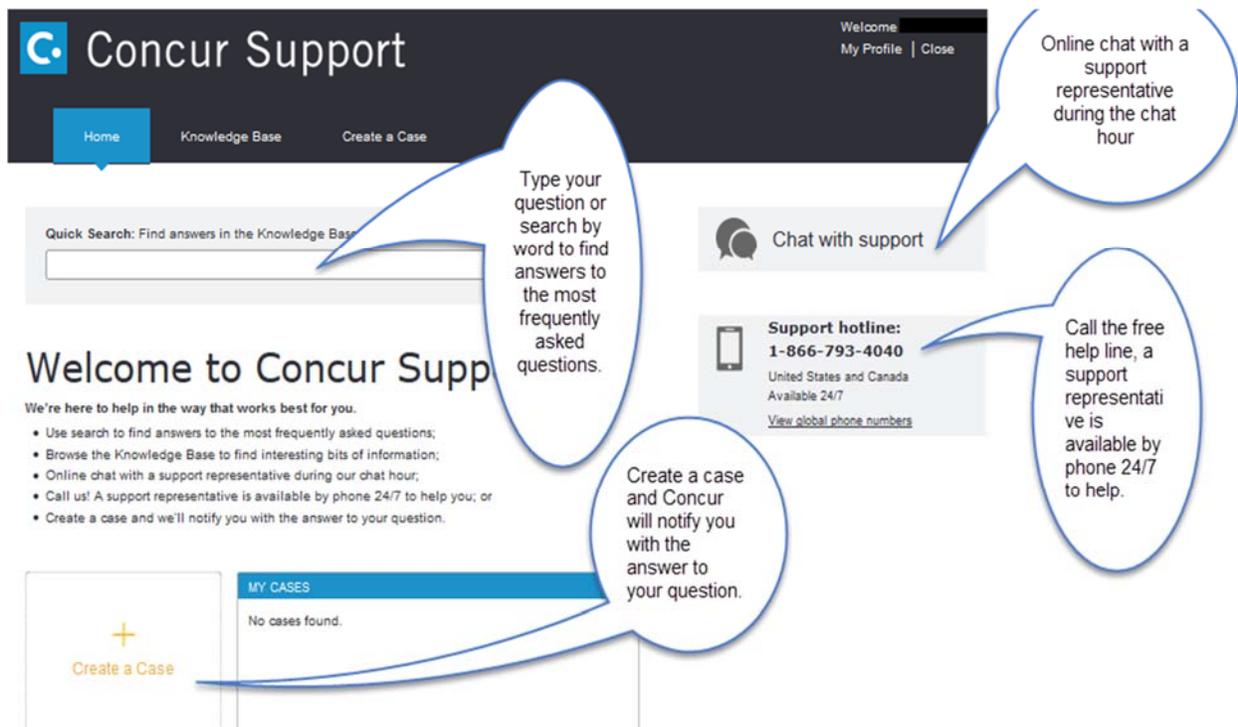
You can find information on using the system on the Professional Expense Reimbursement web page:

<https://hrdochrh.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.

Benefits Sector

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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

