This how-to sheet outlines the steps required to:

- Complete the following tasks in your profile the **first time you log into SAP Concur**.

  1. **Verify your email address.** This will allow you to email receipts to SAP Concur (receipts@expenseit.com), letting the system create expense lines for you (i.e. do some of the work for you).

  2. **Check your default index** (also called funding source, FOAPAL). Unless you request a change from Financial Information Systems (financial.systems@carleton.ca), all your expenses are charged to this index.

  3. **Check the default approver for your reports.** Also called the one-up supervisor, this is the person that you directly report to. This person approves all claims.

**What is the SAP Concur Travel and Expense Reimbursement system used for?**

- Requesting reimbursement for expenses (i.e. either travel or non-travel) that you have paid out of pocket (i.e. using your own personal money).

**Governing Policies can be found on the University Secretariat’s site:**

- Approval and Delegation of Authority

**THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A DESKTOP COMPUTER/ LAPTOP**

1. **Verifying your email address ...**

   From the landing page, click on the profile button (it will be grey until you hover over it).

   Choose ‘Profile Settings’.
2. **Verifying your email address …**

From the menu on the left, click on ‘Email Addresses’.

3. **Verifying your email address …**

Your carleton email address is pre-populated for you under ‘Email 1’.

You must verify this email address **before** you can begin emailing receipts to receipts@expenseit.com.

Click on the blue ‘Verify’ text.

**Tip:** In the future, click on the blue ‘How do I verify my email address?’ for the steps to verify your email address.

4. **Verifying your email address …**

Click the blue ‘OK’ button on the ‘Verification Email Sent’ box that opens.
5. **Verifying your email address**

Check your email inbox for a verification message from Concur (this step does not take place in SAP Concur).

Copy the code from the email message.

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6. **Verifying your email address**

Paste the code from the email message into the ‘Enter Code’ box, next to the email address.

Click ‘OK’ to submit the code and complete the verification.

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7. **Verifying your email address**

Click OK on the ‘Email Verification Status’ box.

You can now email receipts to receipts@expenseit.com. SAP Concur will ‘read’ your receipts using Optical Character Recognition (OCR) and will create expense lines for you.

**Tip:** If your receipts are sent to a personal email address, add them here by clicking on the red ‘Add an email address’ text. You can add up to 4 personal email addresses. You will have to follow these steps to verify each one.
8. **Checking your default index …**

Carrying on from Step 7 of this how-to sheet, click on ‘Expense Information’.

**Definition:** The default index is pre-populated by Financial Information Systems (i.e. you cannot change it yourself). The default index is automatically applied to all reports.

You can **always change** the default index at the report level if needed.

9. **Checking your default index …**

Verify that the index is correct (also called funding source, FOAPAL).

**Tip:** Verify that the default index has been updated each time you change positions.

**IMPORTANT!** If the index is incorrect, email financial.systems@carleton.ca and request an update.
10. **Checking your approver ...**

Carrying on from Step 9 of this how-to sheet, click on ‘Expense Approvers’.

**Definition:** Also called one-up supervisor, the approver is the person that you directly report to. This person approves all claims.

11. **Checking your approver ...**

**Tip:** Each time you change positions, ensure that your approver has been updated.

**IMPORTANT!** If the approver is incorrect, email financial.systems@carleton.ca and request an update.

**What next?**

- Visit carleton.ca/facts/travel to find more how-to sheets.
- Questions about the system? Email financial.systems@carleton.ca.