

SAP CONCUR How-To Sheets for Delegates Switching to a Claimant's SAP Concur Account

This how-to sheet outlines the steps required:

- For delegates to switch to a claimant's SAP Concur account from a laptop or desktop computer.

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

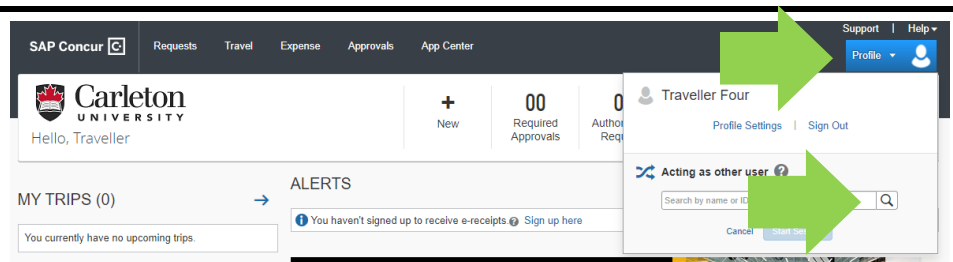
- Requesting reimbursement for expenses (i.e. either travel or non-travel) that you have paid out of pocket (i.e. using your own personal money).

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

- You have already signed into your personal SAP Concur account.

- Click on 'Profile'.

In the window that opens, click on the search icon.

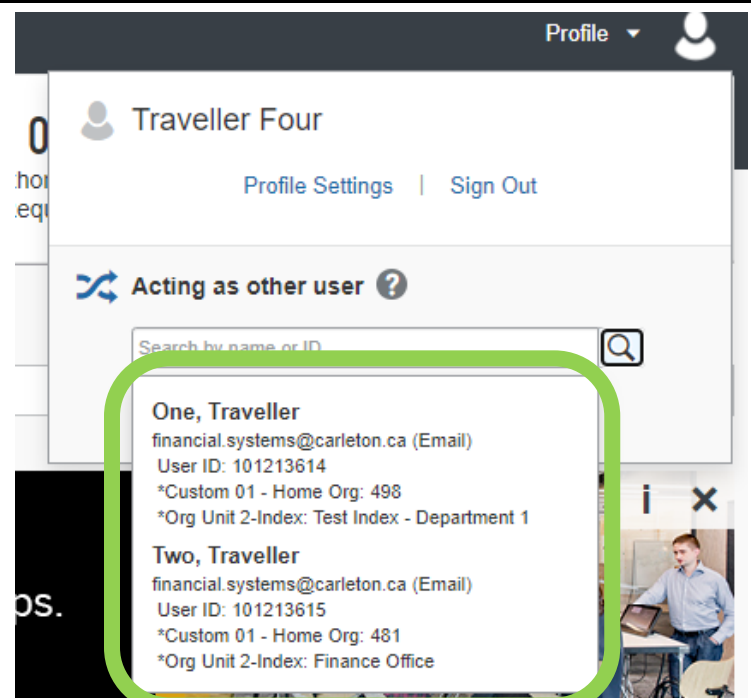


- In the window that opens, click on the name of the traveller on whose behalf you are acting.

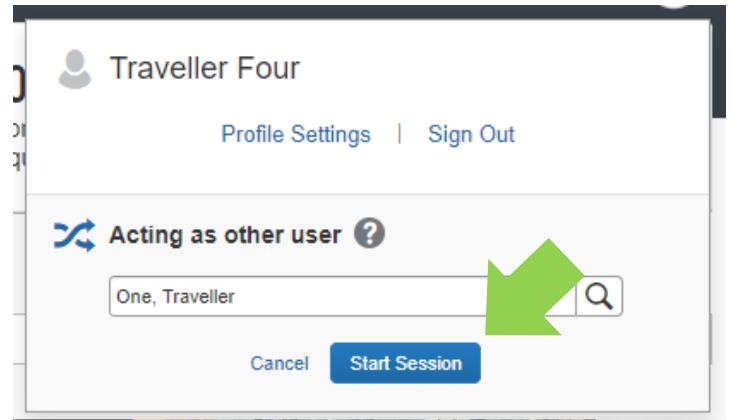
If the claimant you are looking for is not listed, contact financial.systems@carleton.ca

Note: This screen capture has been taken from the training environment, actual names will appear on your screen.

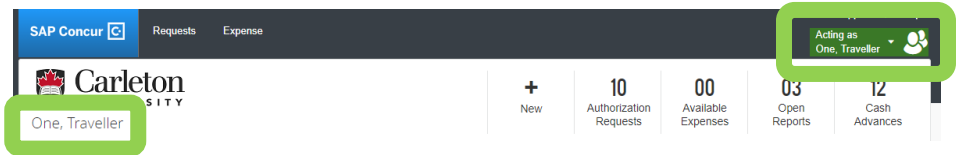
Tip: If you see 'Too many results found. Please enter additional search criteria.' you simply have to search by name or Banner ID in the search field.



- Once you've chosen a claimant, click on the blue 'Start Session' button.

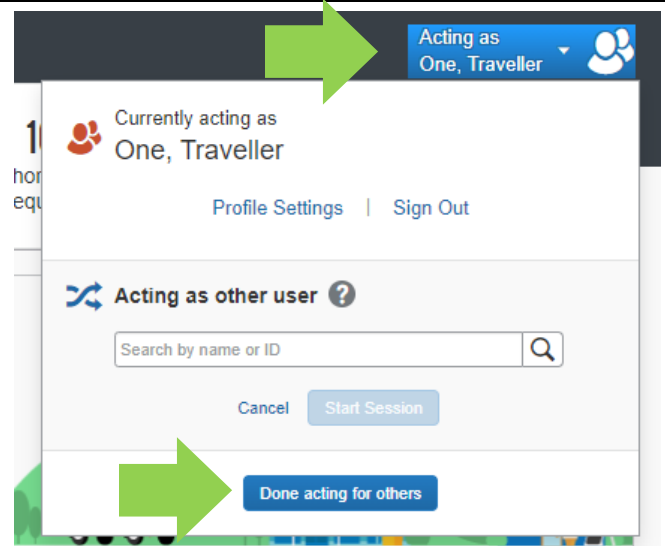


- You are now acting as the delegate.



- To stop acting as this claimant, click on the 'Acting as One, Traveller' button.

In the window that opens, click on the blue 'Done acting for others' button.



What next?

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