

SAP CONCUR How-To Sheets for Contract Instructors

Submitting an expense report

This how-to sheet outlines the steps required to:

- Submit an expense report for reimbursement.

Important note:

- Retain paper receipts until you have received payment.

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

- Requesting reimbursement for eligible expenses covered by Professional Development Fund (PDF) for contract instructors (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

1. From the landing page, click on the 'Start a Report' button.



2. Begin by filling in the required fields. Required fields are identified with a red asterisk.

As a contract instructor, leave the default 'Expense Policy' (i.e. CI – Professional Development Fund Policy) to claim expenses against your PDF.

NOTE: If you have an additional role at Carleton, you can change the 'Expense Policy' field. Reach out to financial.systems@carleton.ca if you are unsure.

As a contract instructor, you **must** choose '**Contract Instructors – Professional Development Fund only**' for the following fields:

- Purpose
- Report Type
- Affiliation

For the 'Index' field, you **must** leave the default, '**(D11125) Central Benefits**'.

CAUTION: The question mark icons above fields have not been written for contract instructors.

Create New Report

Expense Policy * CI - Professional Development Fund Policy

Report Name * Books and software for teaching

Report Date * 22/06/2021

Purpose Contract Instructors - Professional Development F...

Report Type * Contract Instructors - Professional Development F...

Affiliation * Contract Instructors - Professional Development F...

Report Total

Index * (D11125) Central Benefits

Comments To/From Approvals/Processors

Cancel Create Report

3. Click the blue 'Create Report' button.

Create New Report

Expense Policy *
CI - Professional Development Fund Policy

Report Name *
Books and software for teaching

Report Date *
22/06/2021

Purpose
Contract Instructors - Professional Development F...


Report Type *
Contract Instructors - Professional Development F...

Affiliation *
Contract Instructors - Professional Development F...

Report Total

Index *
(D11125) Central Bonolths

Comments: To/From Approvals/Processors



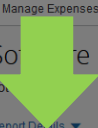
4. Add expenses by clicking the blue 'Add Expenses' button.
- Click on the type of expense you want to add.

You are currently logged in

SAP Concur

Manage Expenses

Report Details Print/Share



Add Expense

Available Expenses 0 Create New Expense +

Search for an expense type

- Relocation Expenses
- ^ 20. PDF Expenses (for Contract Instructors only)
 - Accommodations - PDF
 - Airfare - PDF
 - Association/membership fees and professional dues - PDF
 - Books & Journals - PDF
 - Bus - PDF
 - Car Rental - PDF
 - Computer Equipment/Software Supplies - PDF
 - Conference/Registration Fees - PDF
 - Office Supplies - PDF

Requester

30/2/2021 \$600.50

\$600.50

5. In the 'New Expense' window that opens, enter all of the required fields.

Note: The required fields may vary by 'Expense Type'.

SAP Concur Expense App Center Support Help Profile

Manage Expenses

New Expense Cancel Save Expense

Details Itemizations Hide Receipt

Allocate * Required field

Expense Type *
Computer Equipment/Software Supplies - PDF

Account Code * ? 631604 - Prof'l Develop't Benefit-Contract Transaction Date * ? 23/02/2021

Enter Vendor Name * ? City of Purchase * ? Ottawa, Ontario

Payment Type * ? Out of Pocket

Amount * Currency * ? Canada, Dollar

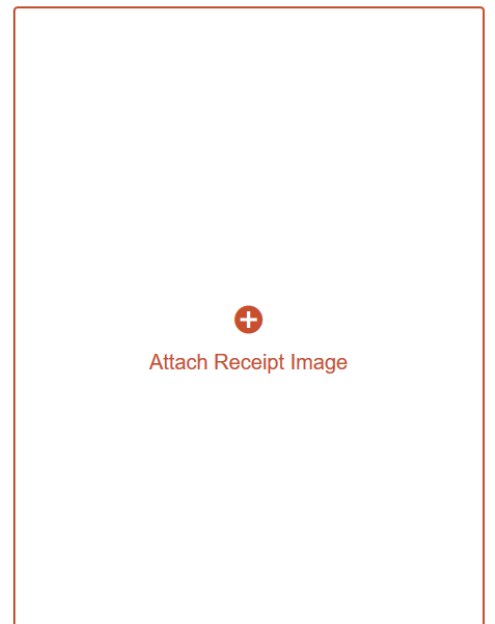
Calculate Tax Receipt Status * ? Receipt

Comment ?

Save Expense Save and Add Another Cancel

- 6a. Attach a digital copy of the required documentation (e.g. receipt) that corresponds to the expense by clicking on the 'Attach Receipt Image' window.

Accepted file types: PNG, JPG, JPEG, PDF, TIF, TIFF.



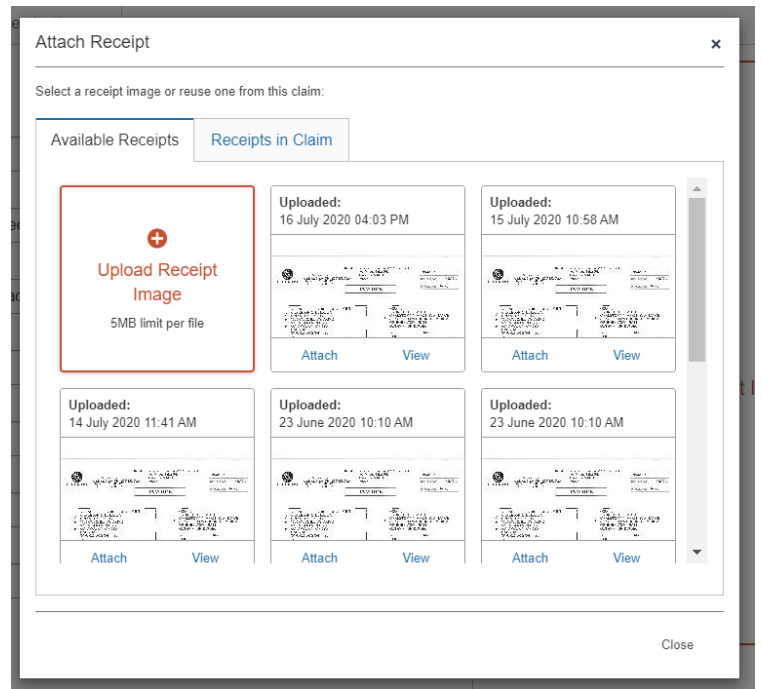
6b. Attach documents can't ...

Use the 'Upload Receipt Image' button to find and attach a file saved on your device.

OR

Click the blue 'Attach' text on an available receipt icon.

Tip: There are many ways to get receipts into Concur. To learn more, choose a related how-to sheet from carleton.ca/facts/travel/contract-instructors.



7. To save the expense, click on the blue 'Save Expense' button.

OR

Click on the blue 'Save and Add Another' button if you have another expense to add.

SAP Concur Expense App Center Support | Help Profile

Manage Expenses

New Expense

Cancel Save Expense Hide Receipt

Allocate

Expense Type * Required field
Computer Equipment/Software Supplies - PDF

Account Code * ? 631604 - Prof'l Develop't Benefit-Contract Transaction Date * ? 23/02/2021

Enter Vendor Name * ? Vyond City of Purchase * ? Ottawa, Ontario

Payment Type * ? Out of Pocket

Amount * 600.50 Currency * ? Canada, Dollar

Calculate Tax Receipt Status * ? Receipt

Comment ?
Software for micro learning project

Save Expense Save and Add Another Cancel

Invoice / Picture
101191598 Savannah Gen...
Detach

8. Click the orange 'Submit Report' button to submit the report for approval.

Tip: Depending on the language preference you have chosen, 'Claim' may be used instead of 'Report'.

SAP Concur Expense App Center Support | Help Profile

Manage Expenses

Software February 2021 \$600.50

Copy Report Submit Report

Not Submitted

Report Details Print/Share Manage Receipts Travel Allowance

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>		Out of Pocket	Computer Equipment/Software Supplies - PDF	Vyond Ottawa, Ontario	23/02/2021	\$600.50
						\$600.50

9. Read the 'Contract Instructor User Electronic Agreement'.

Click the blue 'Accept & Continue' button to **certify** that the text in the 'Contract Instructor User Electronic Agreement' window is true.

Contract Instructor User Electronic Agreement

By clicking on the 'Accept & Submit' button, I certify that:

1. I am a contract instructor represented by CUPE Local 4600 (Unit 2) and had a teaching contract in the academic year. I am submitting the professional development fund claim.
2. This is a true and accurate accounting of expenses to support teaching-related professional development activities; such as books and material required for the performance of an employee's teaching duties and responsibilities which are otherwise not provided to the employee.
3. There are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
4. All required receipt images have been attached to this report.
5. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
6. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying the University in full for those expenses.
7. I acknowledge that any expenses submitted are subject to the allowable limits as outlined in the Collective Agreement between Carleton University and CUPE Local 4600 (Unit 2) or as agreed to by Carleton University and CUPE Local 4600 (Unit 2).

Cancel Accept & Continue

10. In the 'Report Totals' window, the 'Company Pays' total is the amount that will be paid to you.

Click on the black 'Cancel' text to return to the report.

If the total looks good, click on the blue 'Submit Report' button.

Report Totals

Company Pays \$1,821.77 Employee	Employee Pays \$0.00 Company
--	------------------------------------

Amount Total: \$1,821.77	Due Employee: \$1,821.77	Owed Company: \$0.00
Requested Amount: \$1,821.77	Total Paid By Company: \$1,821.77	Total Owed By Employee: \$0.00

Cancel Submit Report

What next?

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