

# SAP CONCUR How-To Sheets for Contract Instructors

## Creating an Expense Report in the SAP Concur Mobile App

**Important note: Retain paper receipts until you have received payment.**

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

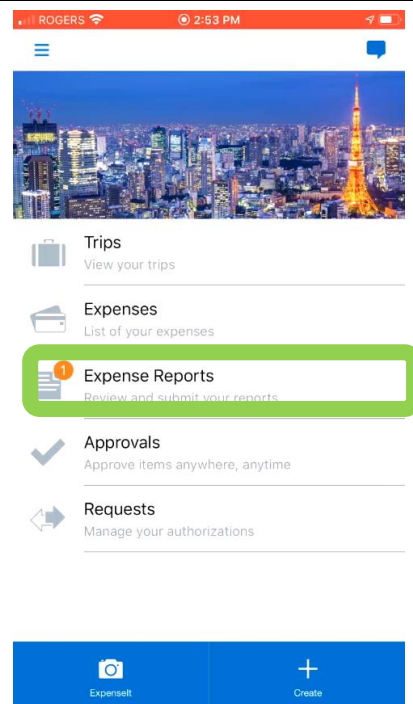
- Requesting reimbursement for eligible expenses covered by Professional Development Fund for contract instructors (i.e. either travel or non-travel) that you have paid out of pocket (i.e. using your own personal money).

### THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A MOBILE DEVICE

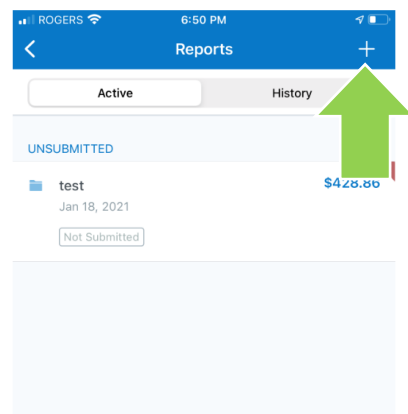
1. **Important note: An iPhone has been used for this example. Look/feel and navigation will vary on Android powered devices and/ or iPads.**

Click on the black 'Expense Reports' text.

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



2. Click on the white '+' to create a new report.

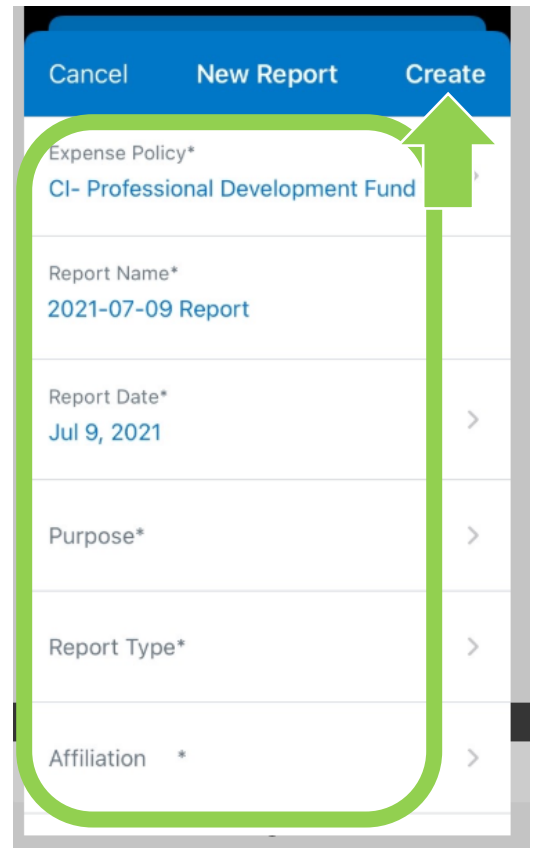


3. Begin by filling in the required fields. Required fields are identified with an asterisk (iPhone) or 'required field' (Android).

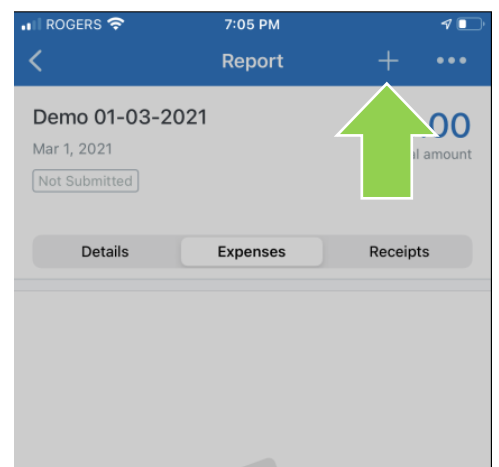
**More information about the fields:**

- **Expense Policy:** As a contract instructor, leave the default 'Expense Policy' (i.e. CI – Professional Development Fund Policy) to claim expenses against your PDF. If you have an additional role at Carleton, you can change the 'Expense Policy' field. Reach out to [financial.systems@carleton.ca](mailto:financial.systems@carleton.ca) if you are unsure.
- **Report Name:** Choose consistent and unique report names.
- **Report Date:** The report date defaults to the date that you start your report.
- **Purpose:** Choose 'Contract Instructors – Professional Development Fund only' from the drop down list.
- **Affiliation:** Choose 'Contract Instructors – Professional Development Fund only' from the drop down list.
- **Pay By:** The only option available for Contract Instructors is 'Cheque/Direct Deposit – CAD'.
- **Index:** ALWAYS leave the default index, '(D11125) Central Benefits'.

Tap the blue 'Create' button at the top of the screen when you are done.



4. Click the white '+' to add an expense line.



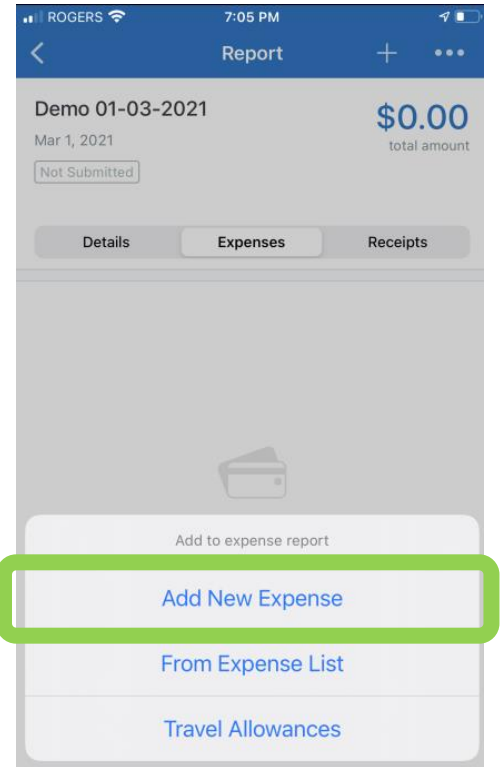
5. There are two ways to populate an expense line.

Click on the blue 'Add New Expense' text to enter manually (option used in this example).

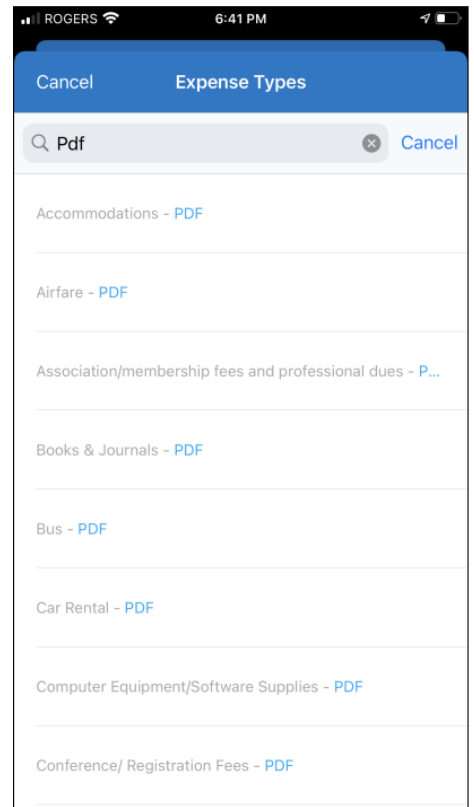
OR

An OCR **pre-populated** expense can be added by clicking the blue 'From Expense List' text.

**Tip:** Read the 'Using SAP Concur Optical Character Recognition to Create Expense Lines (Saves Time!)' how-to sheet to learn more.



6. Choose an expense type.



7. Enter required fields.

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Cancel New Expense Save

Add Receipt

Amount  
\$55.00 CAD

Expense Type \*  
Books & Journals - PDF

Account Code \*  
631604 - Prof'l Develop't Benefit-Contractor

Transaction Date \*  
Tuesday, February 9, 2021

Enter Vendor Name \*  
Bookstore

City of Purchase \*  
Ottawa, Ontario

Currency \*  
Canadian Dollar

8. Click on the blue 'Add Receipt' button to attach supporting documentation.

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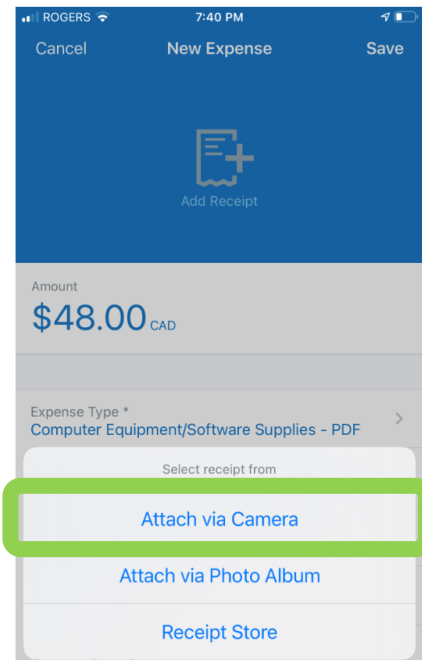
Cancel New Expense Save

Add Receipt

Amount  
\$55.00 CAD

Expense Type \*  
Books & Journals - PDF

- 9a. In this example, click on the blue 'Attach via Camera' text to attach the receipt using the mobile phone's camera.



- 9b. Attaching receipts can't ...

Use a mobile device to take a photo of the receipt.



9c. Attaching receipts can't ...

Click on the white 'Done' text to add the photo.

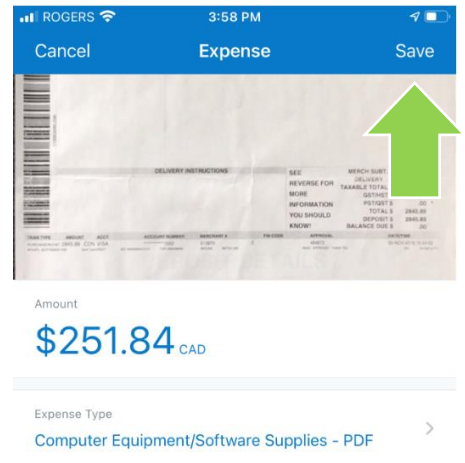
If you can't read the image, click on the white 'Retake' text.

**Tip:** Avoid taking a photo of a white receipt on a white surface.

Click on the white 'Done' text.



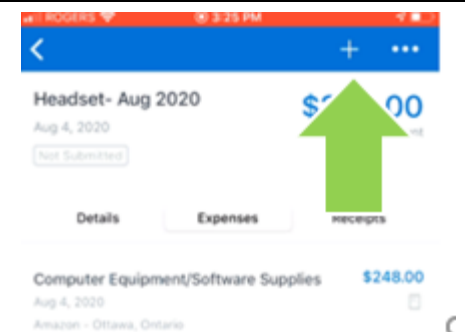
10. Click the white 'Save' text.



11. Click on the white 'plus' sign to add additional expenses and follow Steps 6 through 10.

OR

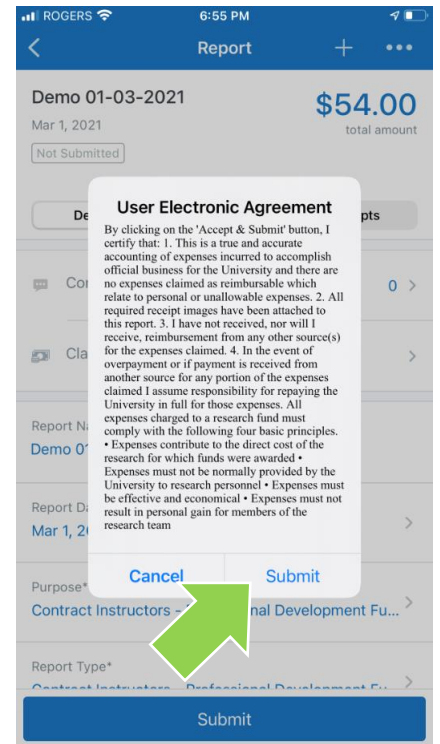
Click on the blue 'Submit' button at the bottom to submit the expense report (shown in step 12).



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12. Read the 'User Electronic Agreement'.

Click on the white 'Submit' button to **certify** that the text in the 'User Electronic Agreement' window is true.



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**What next?**

- Visit [carleton.ca/facts/travel/contract-instructors](http://carleton.ca/facts/travel/contract-instructors) to find more how-to sheets.
  - Questions about the system? Email [financial.systems@carleton.ca](mailto:financial.systems@carleton.ca).
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