

# SAP CONCUR How-To Sheets for Contract Instructors

## Important Tasks to Complete in Your Profile

### 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. The default index, D11125 Central Benefits, is pre-populated by the Financial Information Systems team. It is automatically applied to all reports. If any other index is listed, email financial.systems@carleton.ca.
  3. The approver will always be the 'Senior Labour Relations Officer Academic'. This person approves all claims. If any other approver is listed, email financial.systems@carleton.ca.

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

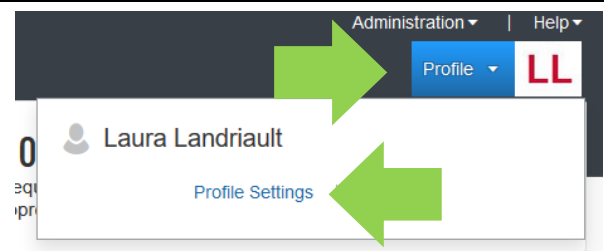
- Requesting reimbursement for eligible expenses covered by Professional Development Fund for contract instructors (i.e. either travel or non-travel) that you have paid out of pocket (i.e. using your own personal money).

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

#### 1. Verifying your email address ...

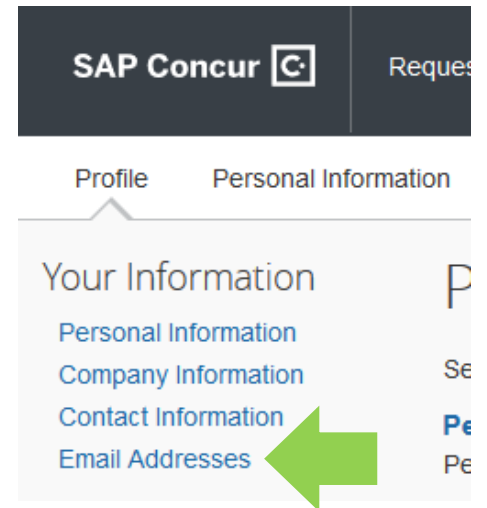
From the landing page, click on the profile button (it will be grey until you hover over it).

Choose 'Profile Settings'.



## 2. Verifying your email address ...

From the menu on the left, click on 'Email Addresses'.



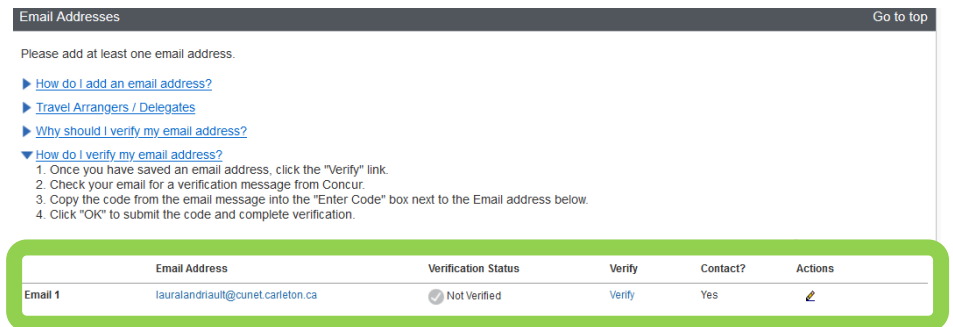
## 3. Verifying your email address ...

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.

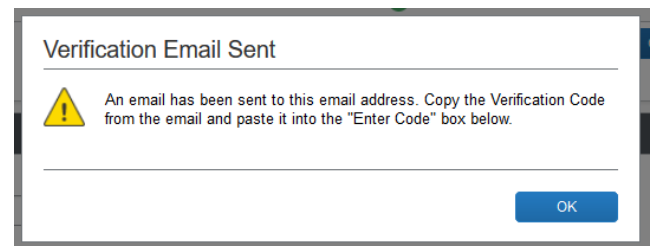
Click on the blue 'Verify' text.

**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 ...

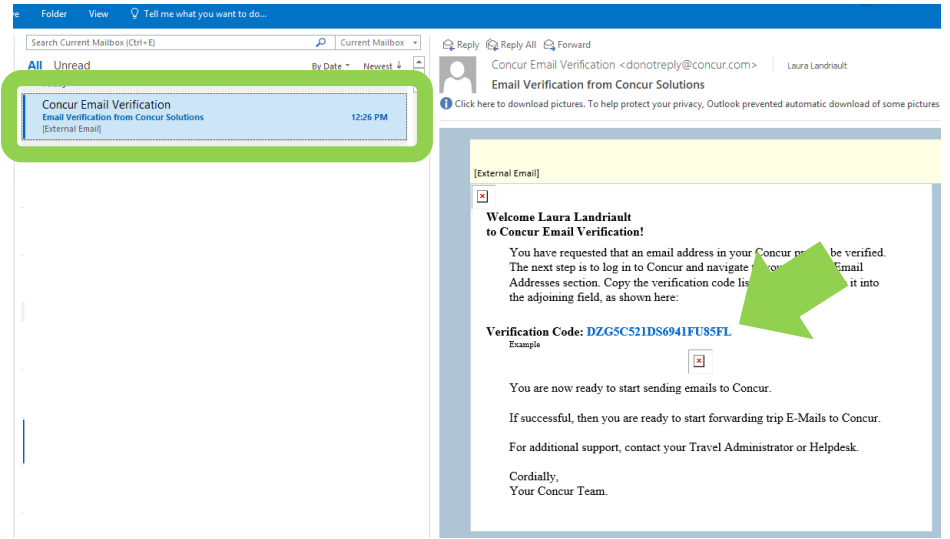
Click the blue 'OK' button on the 'Verification Email Sent' box that opens.



### 5. Verifying your email address ...

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

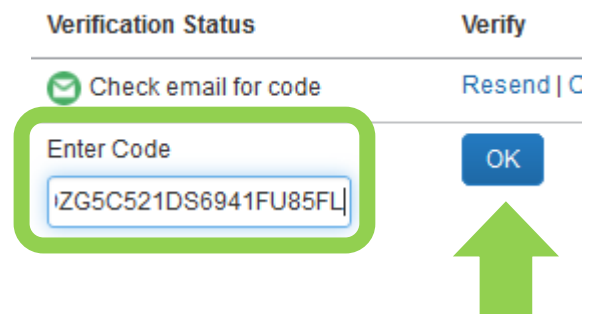
Copy the code from the email message.



### 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.

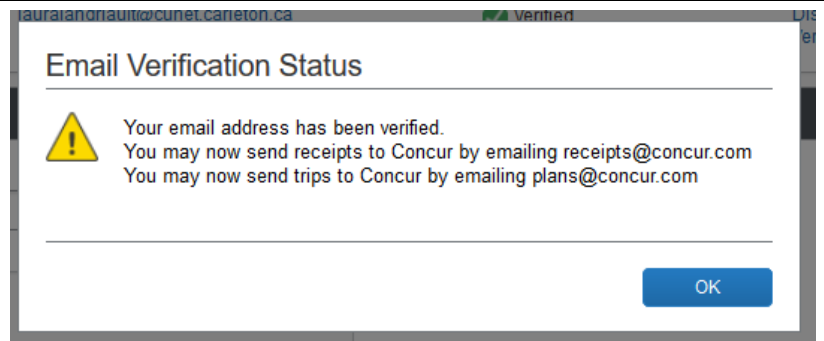


### 7. Verifying your email address ...

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.

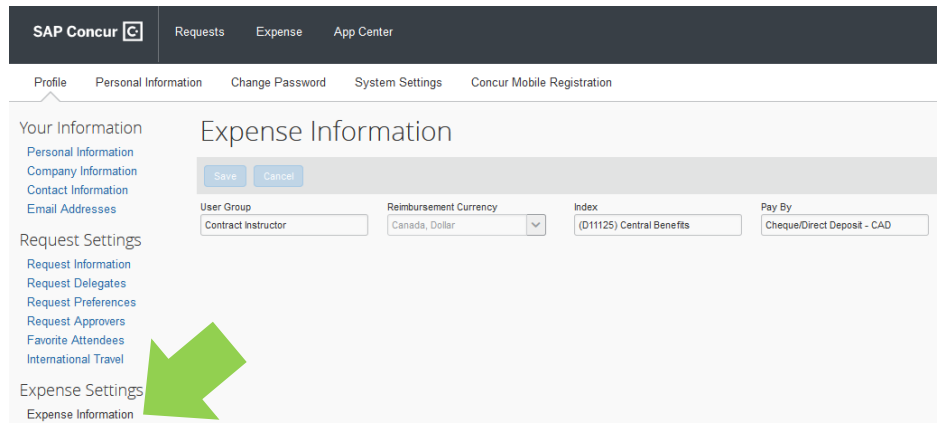


Email Address	Verification Status	Verify	Contact?	
lauralandriault@cunet.carleton.ca	Verified	Disable Verification	Yes	<a href="#">Add an email address</a>

## 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.



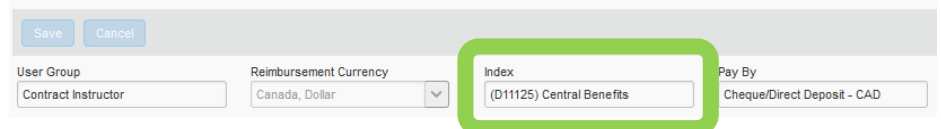
The screenshot shows the SAP Concur interface. At the top, there are navigation tabs: Profile, Personal Information, Change Password, System Settings, and Concur Mobile Registration. The main content area is titled 'Expense Information' and contains several fields: 'User Group' (Contract Instructor), 'Reimbursement Currency' (Canada, Dollar), 'Index' (D11125) Central Benefits, and 'Pay By' (Cheque/Direct Deposit - CAD). A green arrow points to the 'Expense Information' link in the left-hand menu under the 'Expense Settings' section.

## 9. Checking your default index ...

The default index, D11125 Central Benefits, is pre-populated by the Financial Information Systems team. It is automatically applied to all reports.

**IMPORTANT!** If the index is incorrect, email [financial.systems@carleton.ca](mailto:financial.systems@carleton.ca) and request an update.

## Expense Information

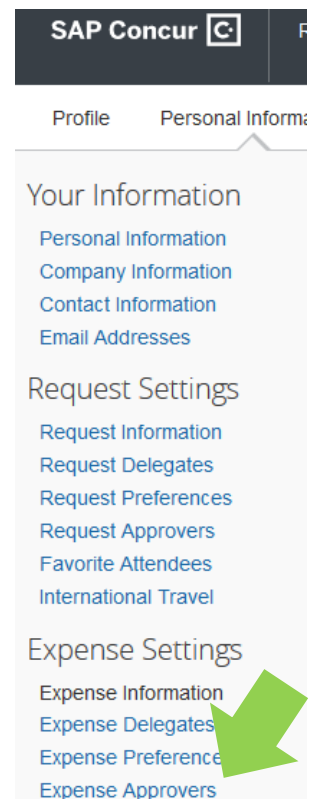


This is a close-up of the 'Expense Information' form. The 'Index' field, which contains '(D11125) Central Benefits', is highlighted with a green rectangular box.

## 10. Your approver ...

The approver listed in your profile will be the dean or chair of the department/faculty you are teaching in.

**Despite the fact that the dean or chair is listed, the approver for your Professional Development Fund (PDF) expenses remains the 'Senior Labour Relations Officer Academic'.**



The screenshot shows the SAP Concur 'Profile' page. The navigation tabs at the top are Profile and Personal Information. The main content area is titled 'Your Information' and lists several links: Personal Information, Company Information, Contact Information, and Email Addresses. Below this is the 'Request Settings' section with links for Request Information, Request Delegates, Request Preferences, Request Approvers, Favorite Attendees, and International Travel. At the bottom is the 'Expense Settings' section with links for Expense Information, Expense Delegates, Expense Preference, and Expense Approvers. A green arrow points to the 'Expense Information' link in the Expense Settings section.

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**What next?**

- Visit [carleton.ca/facts/travel/contract-instructors](https://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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