SAP CONCUR How-To Sheets

Important Tasks to Complete in Your Profile

This how-to sheet outlines the steps required to:

- Complete the following tasks in your profile the **<u>first time you log into SAP Concur</u>**.
    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). Delegates and claimants can also take advantage of this feature.
    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:

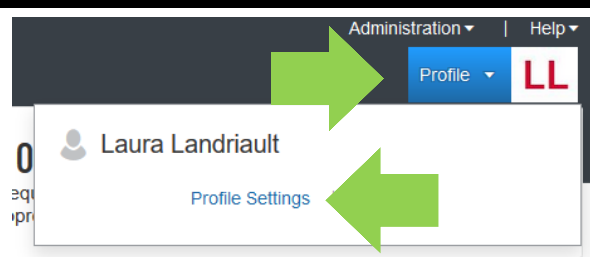
- Approval and Delegation of Authority

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

1. **Verifying your email address …**

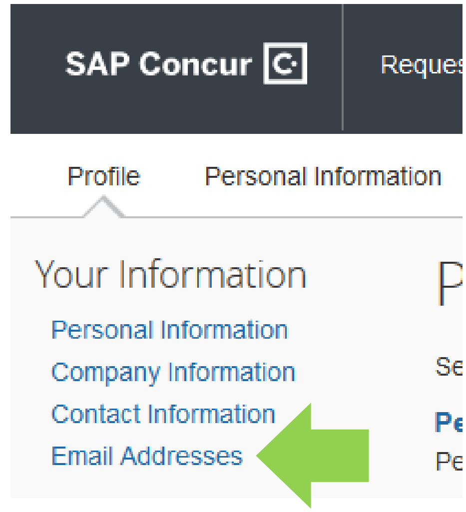
   From the landing page, click on the **'Profile'** button (it will be grey until you hover over it).

   Choose **'Profile Settings'**.



2. **Verifying your email address …**

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



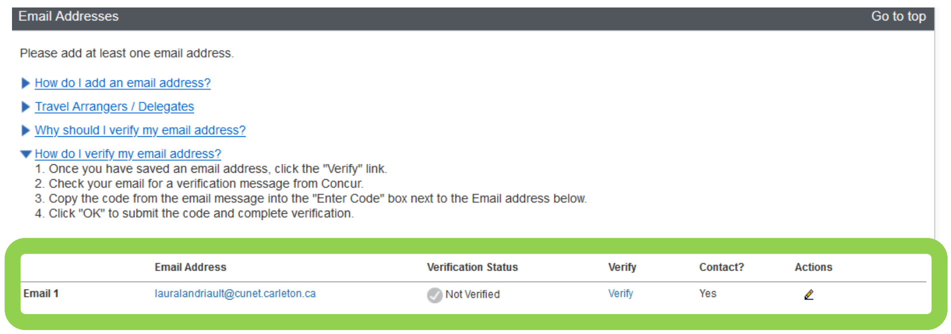
3. **Verifying your email address …**

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.

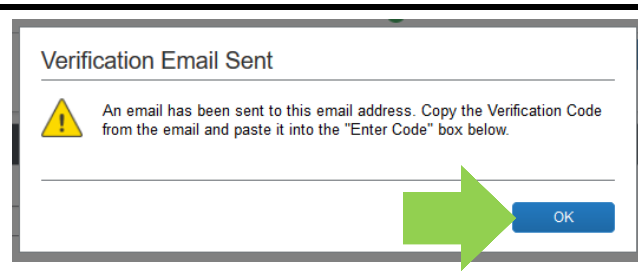
Click on the blue **‘Verify’** text.

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 …**

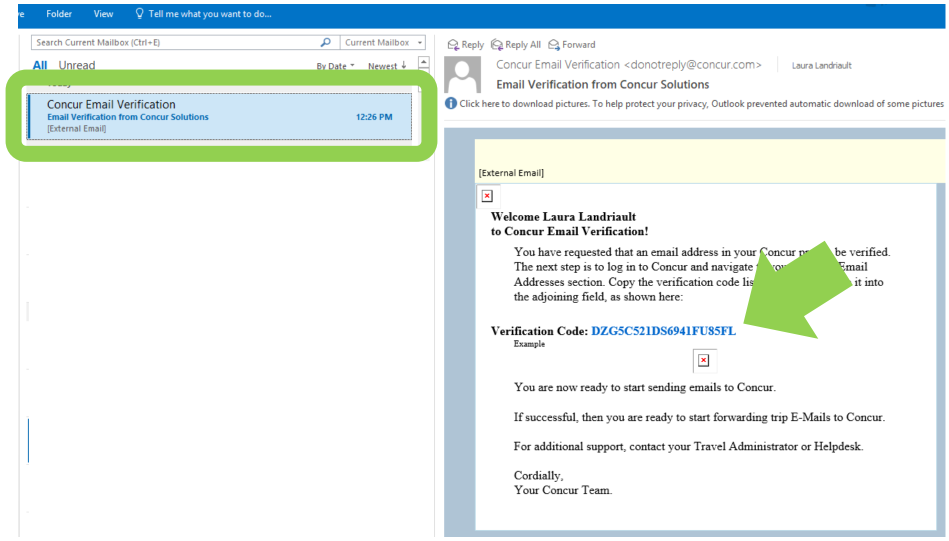
Click the blue **‘OK’** button on the ‘Verification Email Sent’ box that opens.



5. **Verifying your email address …**

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

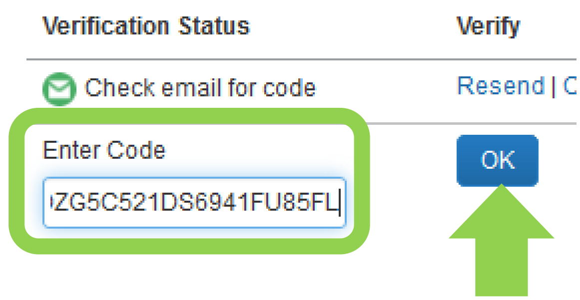
Copy the code from the email message.



6. **Verifying your email address …**

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

Click the blue **'OK'** button to submit the code and complete the verification.

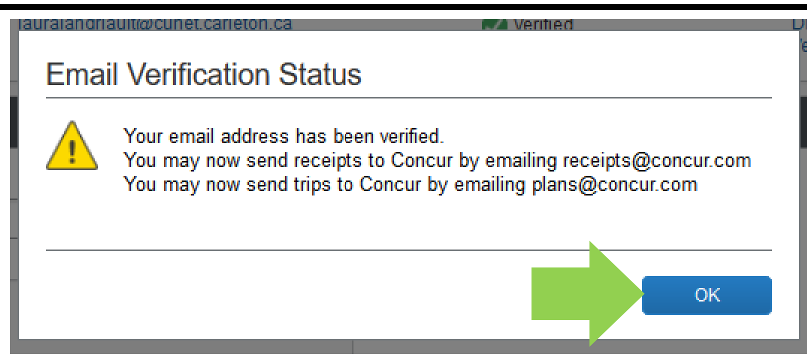


7. **Verifying your email address …**

Click the blue **'OK'** button 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.

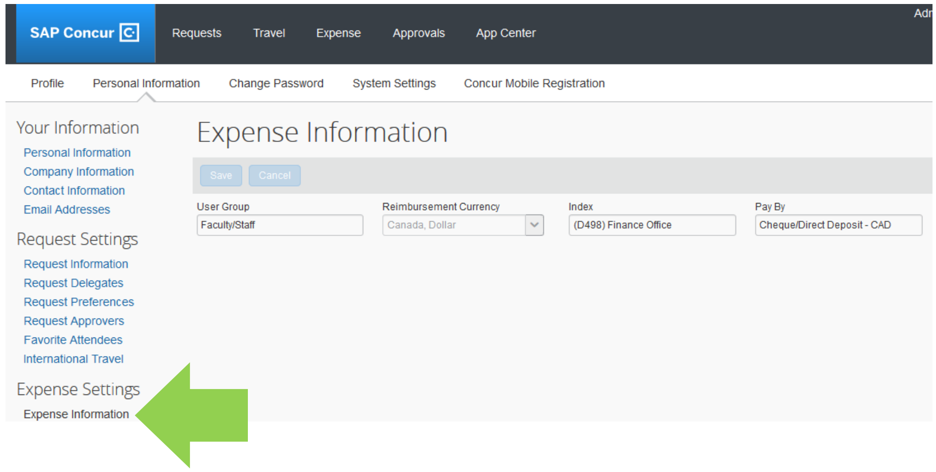


8. **Checking your default index …**

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

DEFINITION: The default index is pre-populated by Fiancial Informaiton 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.

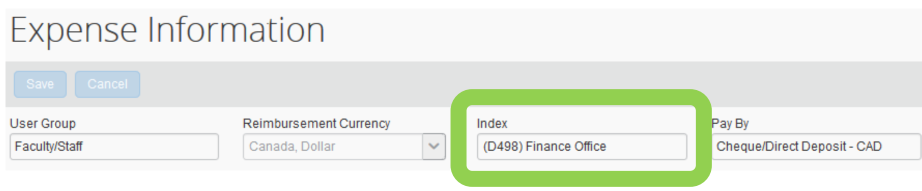


9. **Checking your default index …**

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.

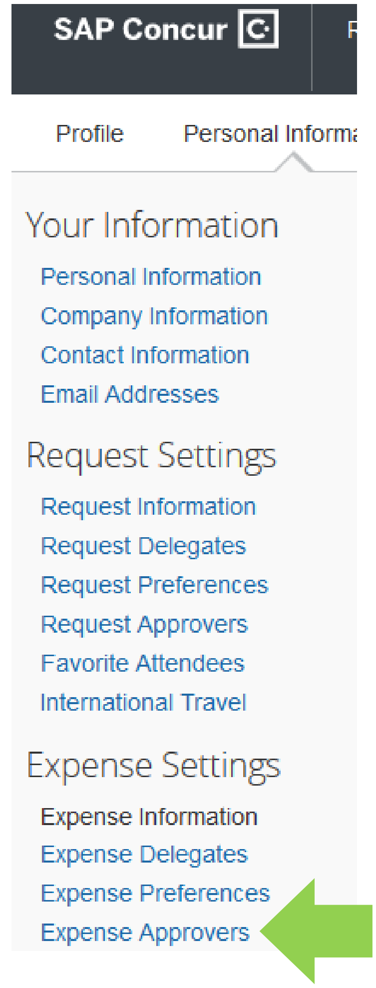
IMPORTANT! If the index is incorrect, email financial.systems@carleton.ca and request an update.



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.