Travel and Expense Reimbursement: Acting as a Delegate
What is a Delegate?

A delegate is an individual who can fill out a request/report on behalf of a traveler (staff/faculty/external visitor).

- “Delegate status” is set up by the Financial Information Systems Team.
- New travelers are assigned by the Financial Information Systems Team.
- Requests can be made through the Travel Account Request Centre at www.carleton.ca/travel.
More about Being a Delegate ...

• Only delegates can reimburse travelers in a foreign currency.

• Delegates are responsible for:
  – digitally attaching receipts
  – digitally attaching the ‘Claimant Declaration’ form
  – making any corrections

• Delegates can
  – view their list of claimants, and
  – delete claimants from their list
Delegates cannot utilize OCR through the App or the email forward feature (i.e. receipts@expenseit.com).

Delegates should work with claimants to connect the app to their profiles AND ask them to forward receipts themselves.

As a delegate, you will be able to retrieve these expenses and move them to the claimants’ reports.
SAP Concur Delegate Demo
Acting as a Delegate

This first step is important ...

[Diagram of a user interface with a pop-up window labeled 'Acting as other user']
How Do I Check Who My Claimants Are?
How Do I Attach the ‘Claimant Declaration’ Form?

IF YOU WORK IN REQUEST:

**NC: Claimant Declaration $234.00**
Not Submitted | Request ID: 4NV

- **Request Details**
- **Print/Share**
- **Attachments**

**EXPECTED EXPENSES**

- **Attach Documents**

IF YOU WORK IN EXPENSE:

**NC: Test for Geri 02/10/2020 $135.00**
Not Submitted

- **Report Details**
- **Print/Share**
- **Manage Receipts**
- **Travel Allowance**

- **Add Expense**
- **Manage Attachments**
- **Missing Receipt Declaration**
Knowledge Check: Poll

Answers are anonymous. We’ll discuss the aggregated results.
Laura Landriault created a poll
Anonymous; Results shared

What is the critical first step in SAP Concur when acting as a delegate?

- switch profiles
- start a report
- start a request
- email delegate

Amanda Langton

Profile Settings | Sign Out

Acting as other user

Search by name or ID

Cancel  Start Session
Are you comfortable loading the claimant declaration form?

- yes
- no
Laura Landriault created a poll
Anonymous; Results shared

Are you comfortable loading the claimant declaration form?

- yes
- no
Need Help?

Virtual office hours
  • carleton.ca/facts/travel-virtual-office-hours/

Email
  • financial.systems@carleton.ca

carleton.ca/facts/travel
  • How-to sheets
  • Frequently Asked Questions