



SAP Concur



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

Importing Receipts into SAP Concur

- 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 ...

The screenshot shows a web application interface. At the top right, there is a dark navigation bar with 'Support | Help' and a blue 'Profile' button with a user icon. A green arrow points to the 'Profile' button. Below this, a dropdown menu is open, showing 'Traveler 2 Traveler 2' with a user icon. A green arrow points to the 'Profile Settings | Sign Out' options. Below the dropdown, a dialog box titled 'Acting as other user' is highlighted with a green border. It contains a search input field labeled 'Search by name or ID' with a magnifying glass icon. At the bottom of the dialog are 'Cancel' and 'Start Session' buttons. The background shows a sidebar with a '+ New' button and a main content area with 'Author' and 'Req' text.

How Do I Check Who My Claimants Are?

Administration | Help



Profile **LL**

Laura Landriault

Profile Settings | Sign Out

Acting as other user ?

Choose a user

SAP Concur | Requests | Travel | Expense | Approvals | App Center

Help

Profile | Personal Information | Change Password | System Settings | Concur Mobile Registration

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees
- International Travel

Expense Settings

- Expense Information
- Expense Delegates

Expense Delegates


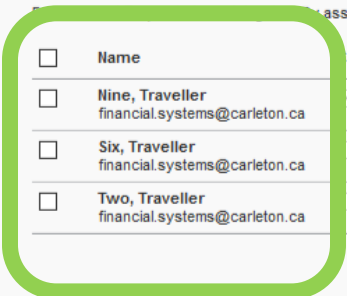
Delegates | Delegate For

Delete

This employee may act as a delegate for the listed employees.


When assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Receives Approval Emails
<input type="checkbox"/>	Nine, Traveller financial.systems@carleton.ca	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Six, Traveller financial.systems@carleton.ca	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Two, Traveller financial.systems@carleton.ca	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

How Do I Attach the 'Claimant Declaration' Form?

IF YOU WORK IN REQUEST:

NC: Claimant Declaration \$234.00  Copy Request Submit Request



Not Submitted | Request ID: 4NV

Request Details ▾ Print/Share Attachments ▾


EXPECTED EXPENSES Attach Documents

Add ▾ Edit Allocate Delete

Alerts Expense type Details Date ▾ Amount Requested



IF YOU WORK IN EXPENSE :



NC: Test for Geri 02/10/2020 \$135.00  Copy Report Submit Report

Not Submitted

Report Details ▾ Print/Share Manage Receipts ▾ Travel Allowance ▾

Add Expense Edit Manage Attachments Missing Receipt Declaration Combine Expenses Move to ▾

Alerts Receipt Payment Type Expense Type Vendor Details Date ▾ Requested



Knowledge Check: Poll

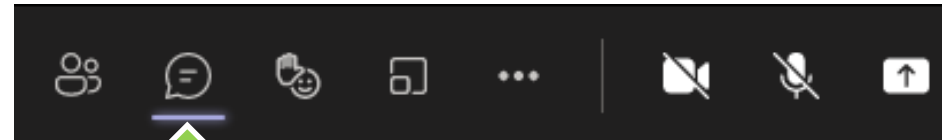
Answers are **anonymous**. We'll discuss the aggregated results.

Forms
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

Submit



Knowledge Check: Answer


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

A screenshot of the SAP Concur user interface. At the top, it shows the user's name 'Amanda Langton' next to a profile icon. Below the name are links for 'Profile Settings' and 'Sign Out'. A section titled 'Acting as other user' with a question mark icon is visible. Underneath is a search input field with the placeholder text 'Search by name or ID' and a magnifying glass icon. At the bottom of this section are two buttons: 'Cancel' and 'Start Session'.

Knowledge Check: Poll

 **Forms**
Poll: Anonymous | Results shared

Are you comfortable loading the claimant declaration form?

yes

no

Submit

Knowledge Check: Answer

Laura Landriault created a poll
Anonymous; Results shared

Are you comfortable loading the claimant declaration form?

- yes
 no

The screenshot shows the SAP Concur interface for an expense report. At the top, there are tabs for 'Requests' and 'Expense', with 'Expense' selected. Below the tabs, there are options for 'Manage Expenses' and 'Cash Advances'. The main title of the report is 'Software and Keyboard March 20'. A red warning icon and the text 'Returned' are visible, along with a comment: 'COMMENT - Traveller Four: vyond software and'. Below the title, there are buttons for 'Add Expense', 'Edit', and 'Manage Attachments'. At the bottom, there is a table with columns for 'Alerts', 'Receipt', 'Payment Type', and 'Expense Type'. The table contains two rows of data, both with 'Out of Pocket' as the payment type and 'Computer Equipm' as the expense type.

Alerts	Receipt	Payment Type	Expense Type
<input type="checkbox"/>		Out of Pocket	Computer Equipm
<input type="checkbox"/>		Out of Pocket	Computer Equipm

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