

# 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?**

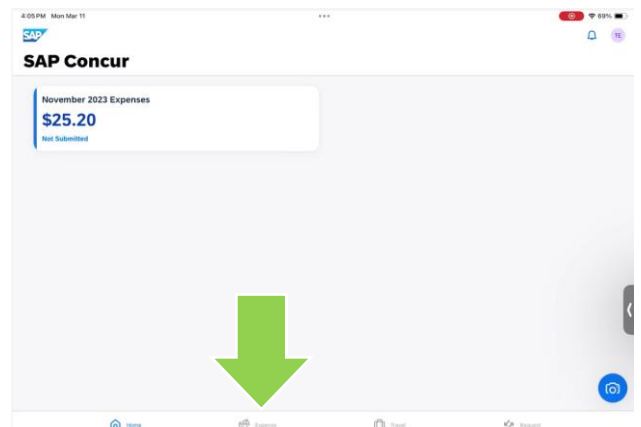
- Requesting reimbursement for eligible expenses covered by Professional Development Fund for contract instructors (i.e. either travel or non-travel) that you have paid out of pocket (i.e. using your own personal money).

*Last updated March 11, 2024.*

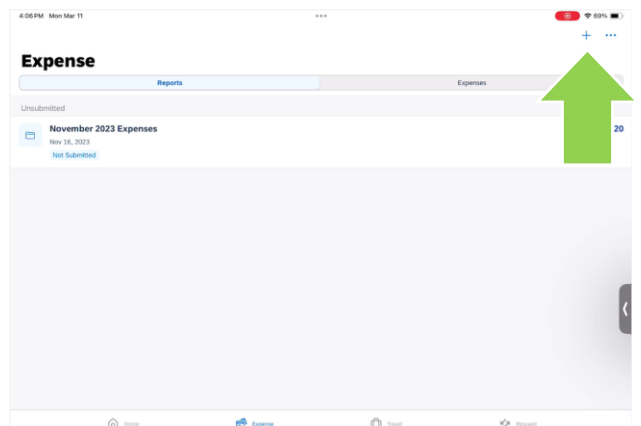
### THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A MOBILE DEVICE

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

Tap on the grey 'Expense' text.

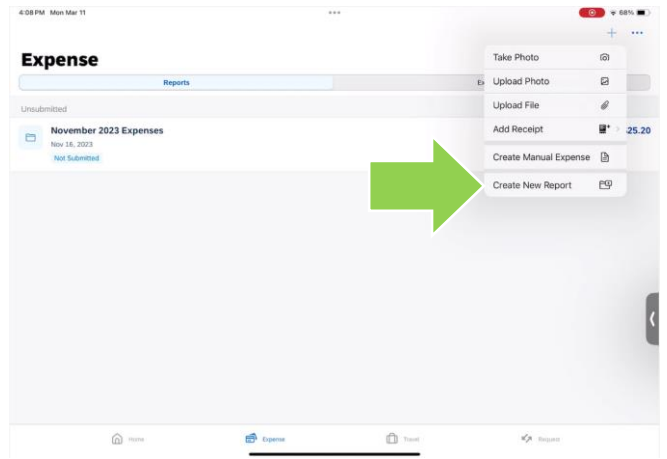


2. Tap on the blue '+' to create a new report.



- From the drop-down menu, choose **'Create New Report'**.

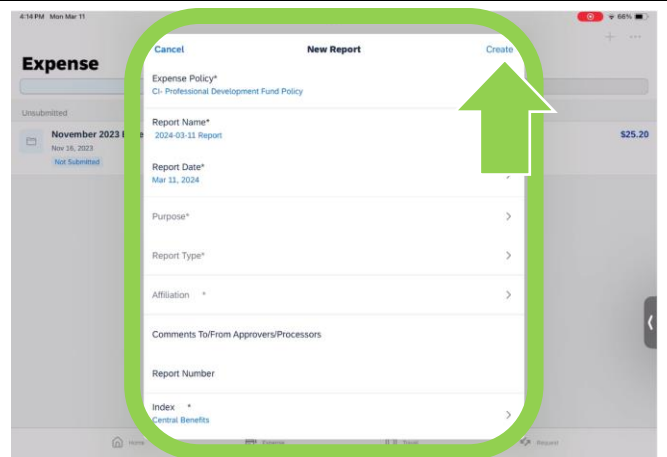
**TIP:** Depending on the language preference you have chosen, 'Claim' may be used instead of 'Report'.



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

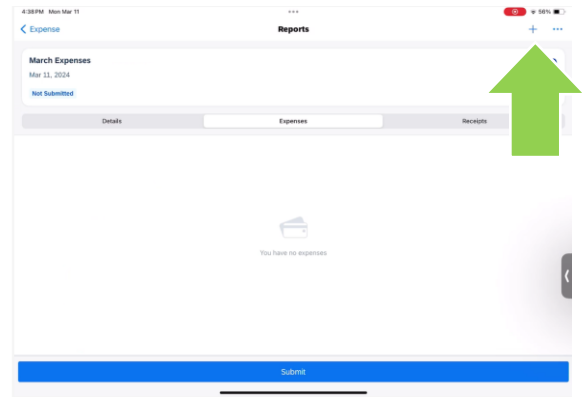
**More information about the fields:**

- **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.
- **Report Type:** 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.
- **Index:** ALWAYS leave the default index, **'Central Benefits'**.



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

5. Tap the blue '+' to add an expense line.



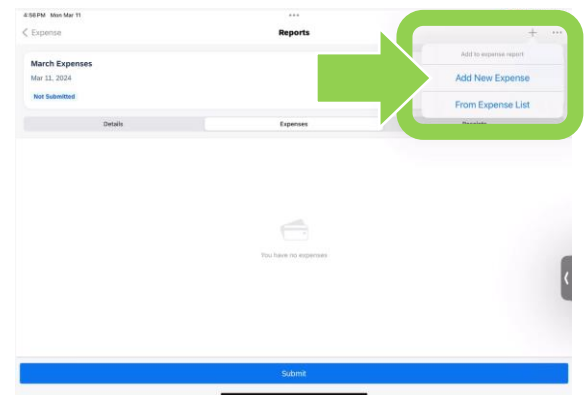
6. From the window, there are two ways to populate an expense line.

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

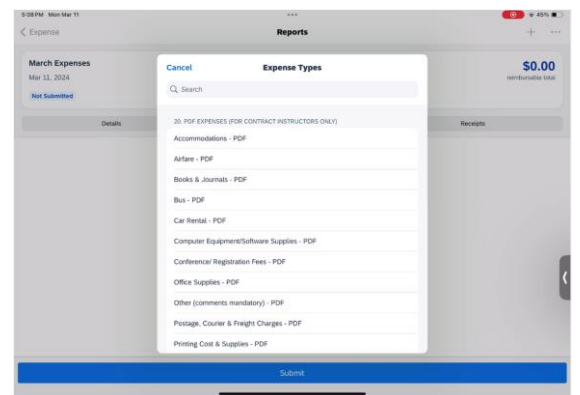
OR

A pre-populated expense can be added by tapping the blue **'From Expense List'** text.

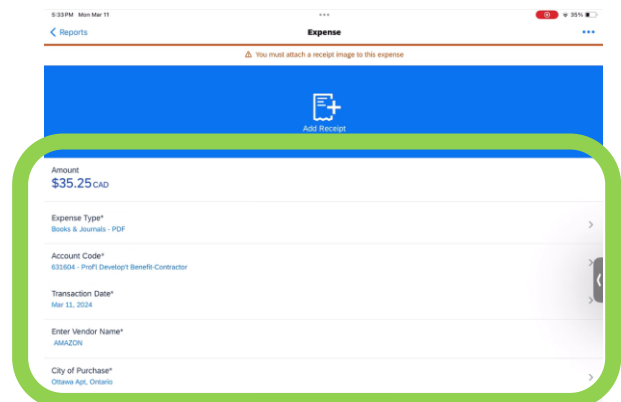
**Tip:** Read the ['Using SAP Concur features to create expense lines for you' how-to sheet](#) to learn more.



7. Choose an expense type.

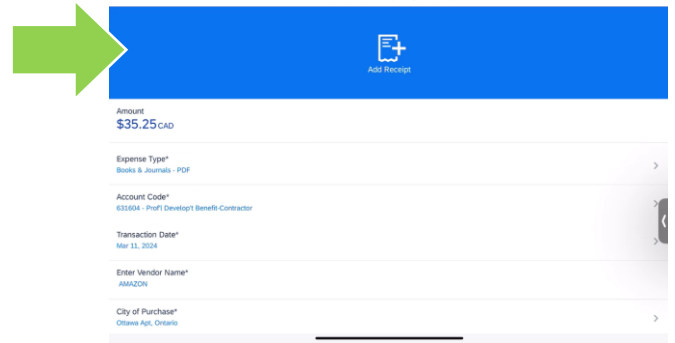


8. Enter required fields.



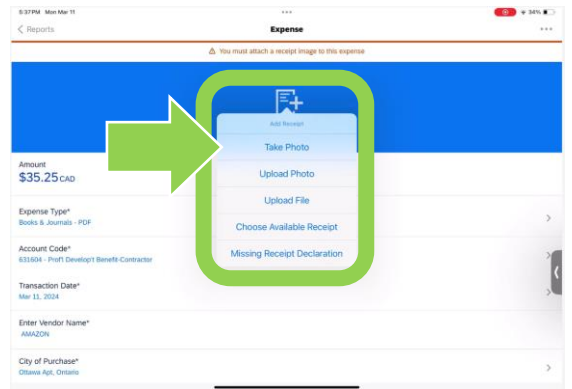
9a. **Attach documentation**

Tap on the blue **'Add Receipt'** button to attach supporting documentation.



9b. **Attach documentation**

In this example, tap on the blue **'Take Photo'** option to attach the receipt using the iPad's camera.



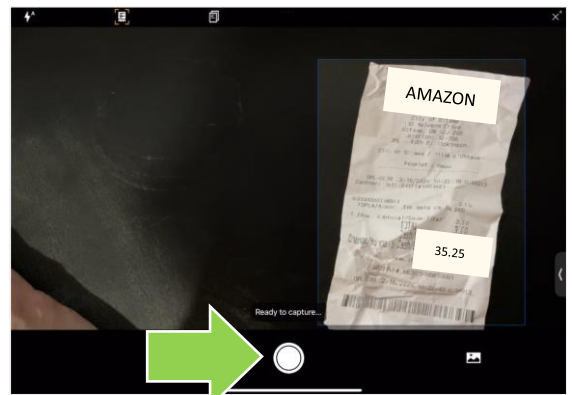
9c. **Attach documentation**

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

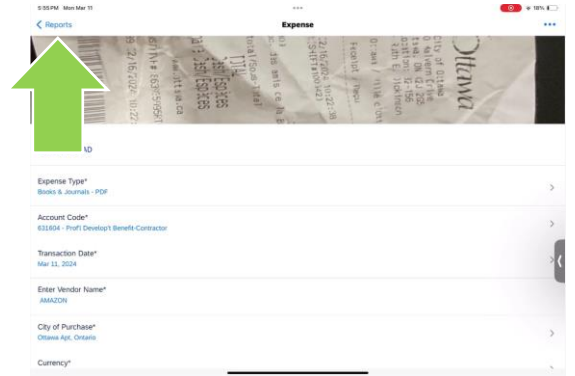
**NOTE:** This clearly edited receipt would not be accepted.

Tap on the **'white, round'** button.

Tap on the white **'Done'** text.



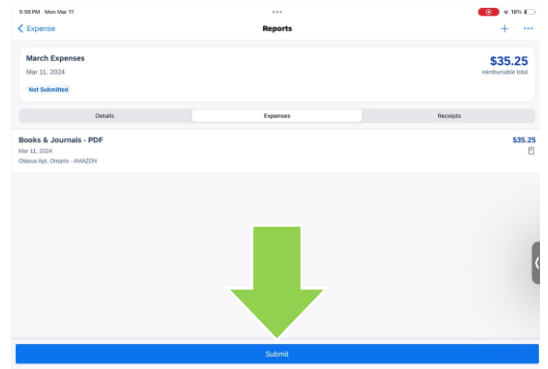
10. Tap on the blue **'Reports'** text.



11. Tap on the blue **'plus'** sign to add additional expenses and follow Steps 5 through 10.

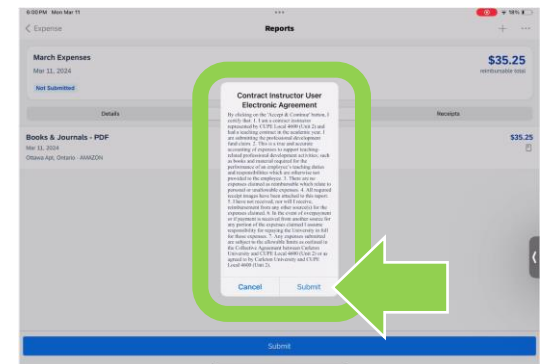
OR

Tap on the blue **'Submit'** button at the bottom to submit the expense report.



12. Read the **'Contract Instructor User Electronic Agreement'**.

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



### What next?

- [FACTS' Contract Instructors Support for SAP Concur page.](#)
- Questions about the system? Email [financial.systems@carleton.ca](mailto:financial.systems@carleton.ca).