

# SAP CONCUR How-To Sheets for Contract Instructors

## Submitting an expense report

### This how-to sheet outlines the steps required to:

- Submit an expense report for reimbursement.

### Important note:

- Retain paper receipts until you have received payment.

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

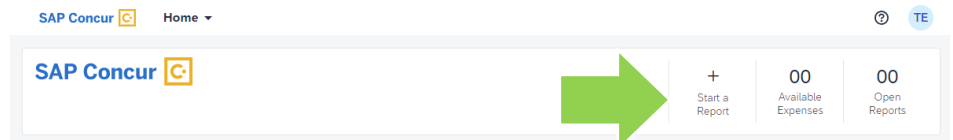
- Requesting reimbursement for eligible expenses covered by Professional Development Fund (PDF) for contract instructors (i.e. either travel or non-travel) that you have paid out of pocket (i.e. using your own personal money).

*Last updated February 28, 2024.*

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

1. From the landing page, click on the **'Start a Report'** button.

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



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2. Begin by filling in the required fields. Required fields are identified with a red asterisk.

As a contract instructor, leave the default 'Expense Policy' (i.e. CI – Professional Development Fund Policy) to claim expenses against your PDF.

**NOTE:** 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.

As a contract instructor, you **must** choose '**Contract Instructors – Professional Development Fund only**' for the following fields:

- Purpose
- Report Type
- Affiliation

For the 'Index' field, you must leave the default, '(D11125) Central Benefits'.

**CAUTION:** The question mark icons above fields have not been written for contract instructors.

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The screenshot shows a 'Create New Report' form with the following fields and values:

- Expense Policy \***: CI- Professional Deve...
- Report Name \***: November 2023 Expenses
- Report Date \***: 11/16/2023
- Purpose \***: Contract Instructors - ...
- Report Type \***: Contract Instructors - ...
- Affiliation \***: Contract Instructors - ...
- Report Number**: (empty)
- Index \***: (D11125) Central B X

The form also includes a 'Report Total' field, a 'Comments To/From Approvers/Processors' field (0/500), and 'Cancel' and 'Create Report' buttons at the bottom right. A green border highlights the required fields (those with a red asterisk).

3. Click the blue **'Create Report'** button.

Expense Policy \* ⓘ  
CI- Professional Developme...

Report Name \* ⓘ  
November 2023 Expenses

Report Date \* ⓘ  
11/16/2023

Purpose \* Required field  
Contract Instructors - Profes...

Report Type \*  
Contract Instructors - Profes...

Affiliation \* ⓘ  
Contract Instructors - Profes...

Report Total

\*Org Unit 5-Index  
(D11125) Central Benefit: X

Comments To/From Approvers/Processors

Create Report

4. Add expenses by clicking the blue **'Add Expenses'** button.

In the 'Add Expense' window that opens, choose an expense by searching for it in the **'Search for an expense type'** field or choose from the listed options.

Click on the name of the expense you want to add (e.g. books & Journals).

SAP Concur | Expense

0 Available Expenses Create New Expense

Search for an expense type

20. PDF Expenses (for Contract Instructors only)

- Accommodations - PDF
- Airfare - PDF
- Books & Journals - PDF
- Bus - PDF
- Car Rental - PDF
- Computer Equipment/Software Supplies - PDF
- Conference/Registration Exp. - PDF

Add Expense Edit Delete

Delete Report Submit Report

View Available Receipts

5. In the 'New Expense' window that opens, enter all of the required fields.

**NOTE:** The required fields may vary by 'Expense Type'.

The screenshot shows the SAP Concur 'New Expense' form. A green rounded rectangle highlights the following fields: Expense Type (Books & Journals - PDF), Account Code (631604 - Profl Develop't Benefit-Contra...), Transaction Date (11/02/2023), Enter Vendor Name (Amazon), City of Purchase (Ottawa, Ontario), Payment Type (Out of Pocket), Amount (25.20), Currency (Canada, Dollar (CAD)), and Receipt Status (Receipt). The form also includes buttons for 'Save Expense', 'Save and Add Another', and 'Cancel', and a 'Receipt' section with an 'Add Receipt' button.

6a. **Attaching documents**

Attach a digital copy of the required documentation (e.g. receipt) that corresponds to the expense by dragging and dropping a file.

OR

Click on the blue 'Add Receipt' button to find and attach a file.

**Accepted file types:** PNG, JPG, JPEG, PDF, TIF, TIFF.

The screenshot shows the same SAP Concur 'New Expense' form as above, but with a green rounded rectangle highlighting the 'Add Receipt' button in the 'Receipt' section. The form fields are the same as in the previous screenshot.

## 6b. Attaching documents

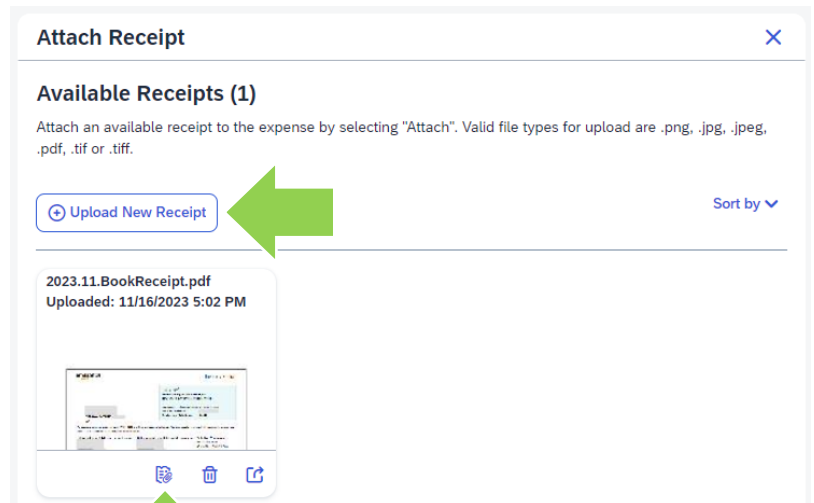
Click the 'Upload Receipt Image' button to find and attach a file saved on your device.

OR

Click the blue 'Attach' text on an available receipt icon.

**TIP:** There are many ways to get receipts into Concur.

The ['Using SAP Concur features to create expense lines for you'](#) how-to sheet can show you how.



7. To save the expense, click on the blue 'Save Expense' button.

OR

Click on the blue 'Save and Add Another' button if you have another expense to add.

8. Click the blue 'Submit Report' button to submit the report for approval.

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

9. Read the 'Contract Instructor User Electronic Agreement'.

Click the blue 'Accept & Continue' button to certify that the text is true.

10. In the 'Report Totals' window, the 'Company Payments' total is the amount that will be paid to you.

Click on the blue 'Cancel' text to return to the report.

If the total looks good, click on the blue '**Submit Report**' button.

In the 'Report Status' window that opens, click on the blue '**Close**' button.

The 'Report Totals' window displays the following information:

<b>Company Payments</b> \$25.20 Employee	<b>Employee Payments</b> \$0.00 Company	
Amount Total: \$25.20	Due Employee: \$25.20	Owed Company: \$0.00
Requested Amount: \$25.20	Total Paid By Company: \$25.20	Total Owed By Fmnl: \$0.00

Buttons: Cancel, **Submit Report**

A green arrow points to the **Submit Report** button.

The 'Report Status' window displays the following information:

**Report Submitted**

November 2023 Expenses | \$25.20

Buttons: **Close**

A green arrow points to the **Close** button.

#### What next?

- Visit the [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).