

SAP CONCUR How-To Sheets for Contract Instructors

Important Tasks to Complete in Your Profile

This how-to sheet outlines the steps required to:

- Complete the following tasks in your profile the first time you log into SAP Concur.
 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).
 2. The default index, D11125 Central Benefits, is pre-populated by the Financial Information Systems team. It is automatically applied to all reports. If any other index is listed, email financial.systems@carleton.ca.
 3. The approver listed in your profile should be the Dean or Chair of the department you teach in. If any other approver is listed, email financial.systems@carleton.ca.

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).

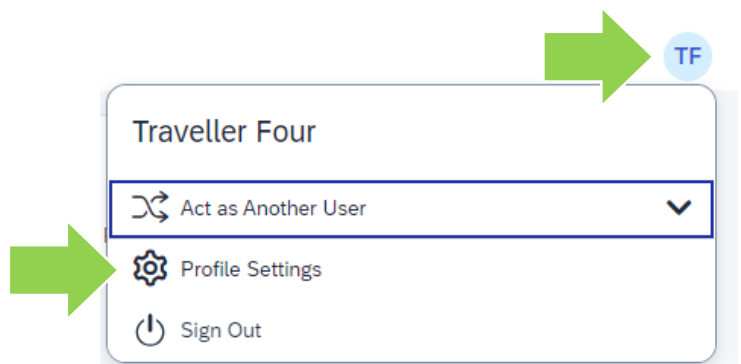
Last updated February 20, 2024.

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

1a. Verifying your email address

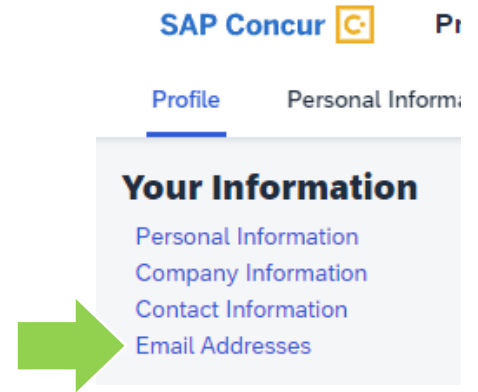
From the landing page, click on the light blue circle with your initials.

In the window that opens, click on the 'Profile Settings' option.



1b. Verifying your email address

From the menu on the left, click on 'Email Addresses'.

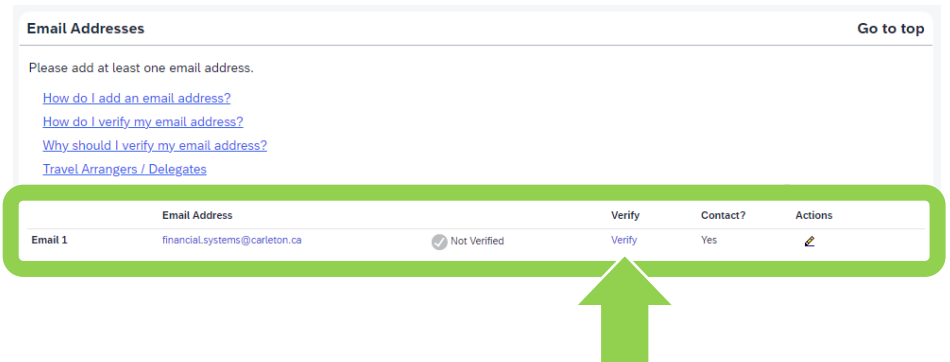


1c. Verifying your email address

Your carleton email address is pre-populated for you under 'Email 1'.

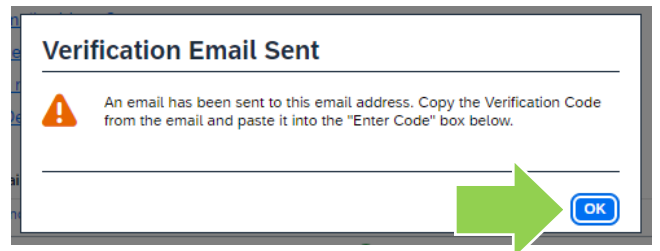
You must verify this email address **before** you can begin emailing receipts to receipts@expenseit.com.

Click on the blue 'Verify' text.



1d. Verifying your email address

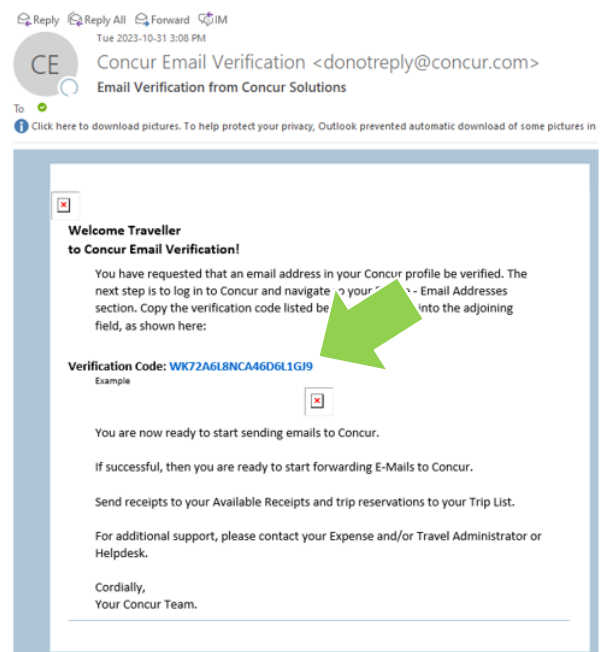
Click the blue 'OK' button on the 'Verification Email Sent' box that opens.



1e. Verifying your email address

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

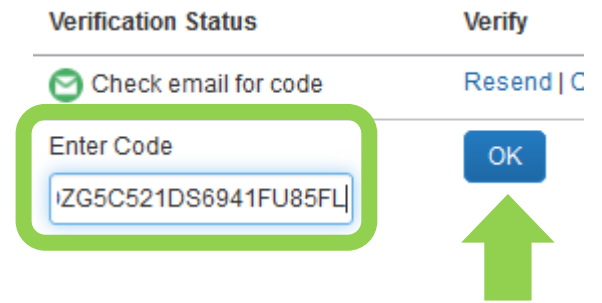
Copy the code from the email message.



1f. Verifying your email address

Paste the code from the email message into the 'Enter Code' field.

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



Verification Status

Verify

Check email for code

Resend | C

Enter Code

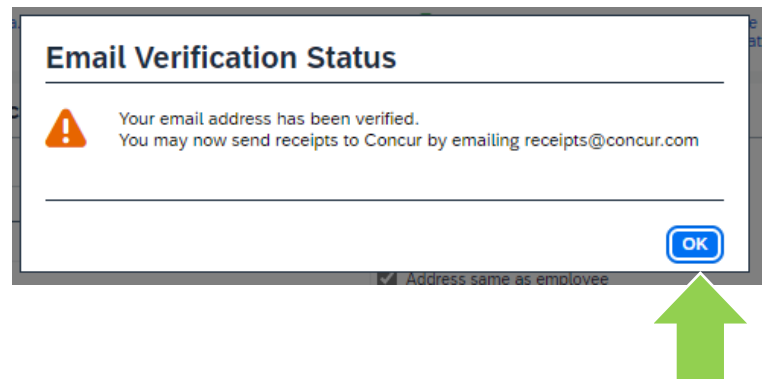
1ZG5C521DS6941FU85FL

OK

1g. 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 and will create expense lines for you.



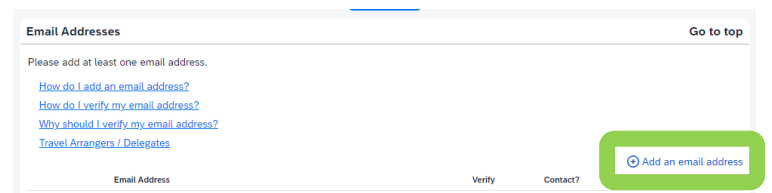
Email Verification Status

Your email address has been verified.
You may now send receipts to Concur by emailing receipts@concur.com

OK

Address same as employee

TIP: If your receipts are sent to a personal email address, add them here by clicking on the blue '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.



Email Addresses

Go to top

Please add at least one email address.

[How do I add an email address?](#)

[How do I verify my email address?](#)

[Why should I verify my email address?](#)

[Travel Arrangers / Delegates](#)

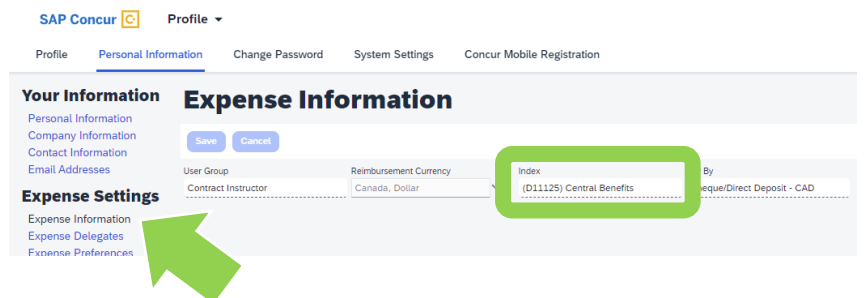
Add an email address

2. Checking your default index

From the menu on the left, click on 'Expense Information'.

The default index, D11125 Central Benefits, is pre-populated by the Financial Information Systems team. It is automatically applied to all reports.

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



SAP Concur Profile

Profile Personal Information Change Password System Settings Concur Mobile Registration

Your Information Expense Information

Personal Information Company Information Contact Information Email Addresses

Save Cancel

User Group Contract Instructor Reimbursement Currency Canada, Dollar Index (D11125) Central Benefits By Direct Deposit - CAD

Expense Settings Expense Information Expense Delegates Expense Preferences

3. Checking your approver

From the menu on the left, click on **'Expense Approvers'**.

The approver listed in your profile will be the Dean or Chair of the department you teach in.

If any other approver is listed, email financial.systems@carleton.ca.

NOTE: When you submit your PDF expenses for approval, they will be approved by the 'Senior Labour Relations Officer Academic' position as per your collective agreement.

Your Information

[Personal Information](#)
[Company Information](#)
[Contact Information](#)
[Email Addresses](#)

Expense Settings

[Expense Information](#)
[Expense Delegates](#)
[Expense Preferences](#)
[Expense Approvers](#)
[Personal Car](#)
[Favorite Attendees](#)



What next?

- Visit carleton.ca/facts/travel/contract-instructors to find more how-to sheets.
 - Questions about the system? Email financial.systems@carleton.ca.
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