

# SAP CONCUR How-To Sheets for Delegates Switching to a Claimant's SAP Concur Account

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

- For delegates to switch to a claimant's SAP Concur account from a laptop or desktop computer.

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

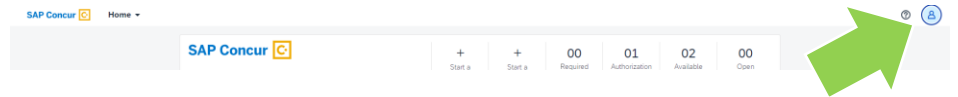
- Requesting reimbursement for expenses (i.e. either travel or non-travel) that you have paid out of pocket (i.e. using your own personal money).

Last updated December 11, 2023

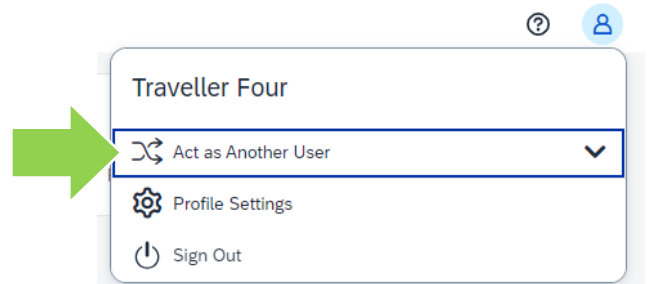
### THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A DESKTOP COMPUTER/ LAPTOP

- You have already signed into your personal SAP Concur account.

- Click on the person icon.

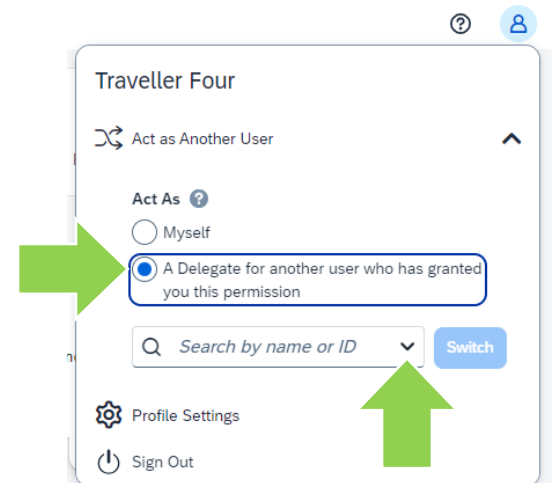


- In the window that opens, click on the 'Act as Another User' option.



- Click the radio button beside 'A Delegate for another user who has granted you this permission'.

Click the down arrow in the 'Search by name or ID' field.

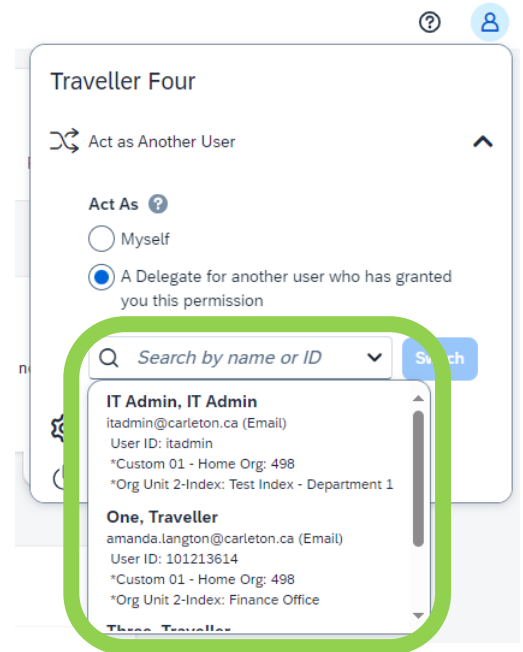


- In the window that opens, click on the name of the claimant on whose behalf you are acting.

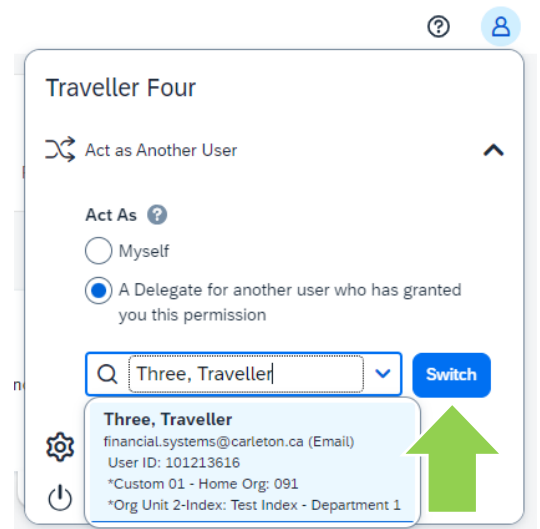
If the claimant you are looking for is not listed, contact [financial.systems@carleton.ca](mailto:financial.systems@carleton.ca)

**Note:** This screen capture has been taken from the training environment. Actual names will appear on your screen.

**Tip:** If you see 'Too many results found. Please enter additional search criteria.' you simply have to search by name or Banner ID in the 'Search by name or ID' field.



- Once you've chosen a claimant, click on the blue 'Switch' button.



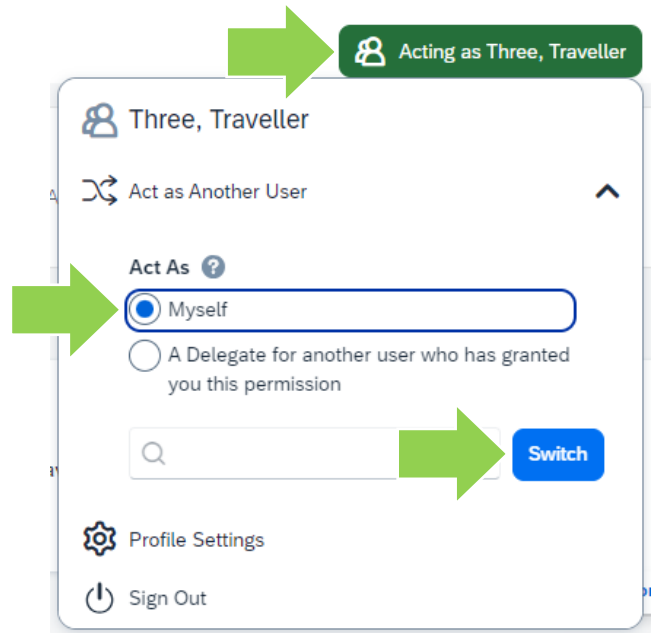
- You are now acting as the delegate.



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8. To stop acting as this claimant, click on the green **'Acting as ...'** button.

Click on the radio button beside **'Myself'**.

Click on the blue **'Switch'** button.



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#### What next?

- Visit [carleton.ca/facts/travel](http://carleton.ca/facts/travel) to find more how-to sheets.
  - Questions about the system? Email [financial.systems@carleton.ca](mailto:financial.systems@carleton.ca).
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