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).

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

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

2. Click on the person icon.

3. In the window that opens, click on the ‘Act as Another User’ option.

4. 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.
5. 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

**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.

6. Once you’ve chosen a claimant, click on the blue ‘Switch’ button.

7. You are now acting as the delegate.
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.

What next?

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