



Concur Overview

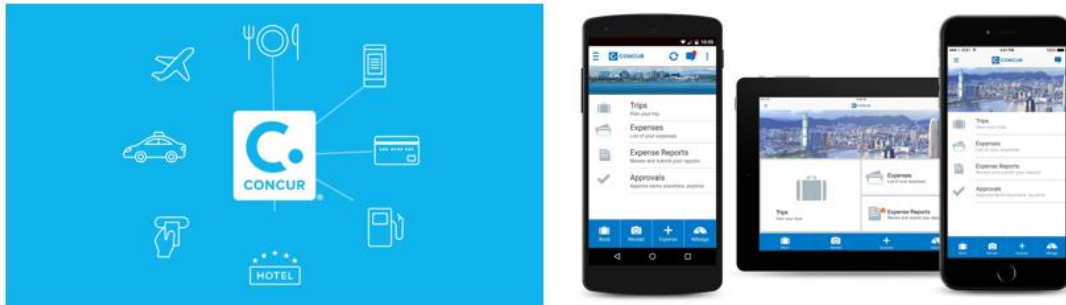


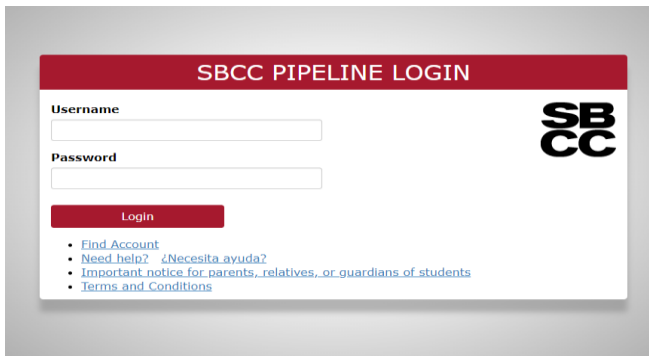
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SECTION 1: LOGGING IN TO CONCUR

1.1 Login to Concur via Desktop

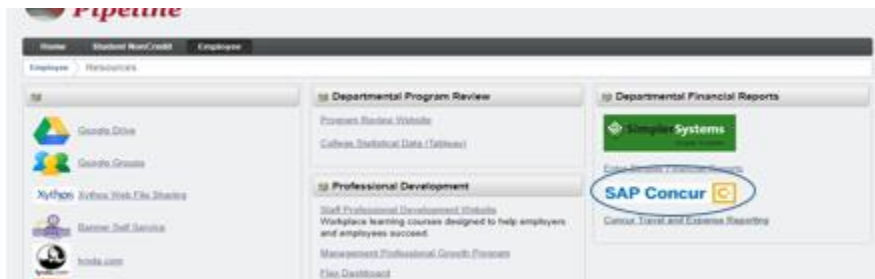
1. Go to: <https://pipeline.sbcc.edu/> in the browser of your choice.
2. Log into your Pipeline Account.



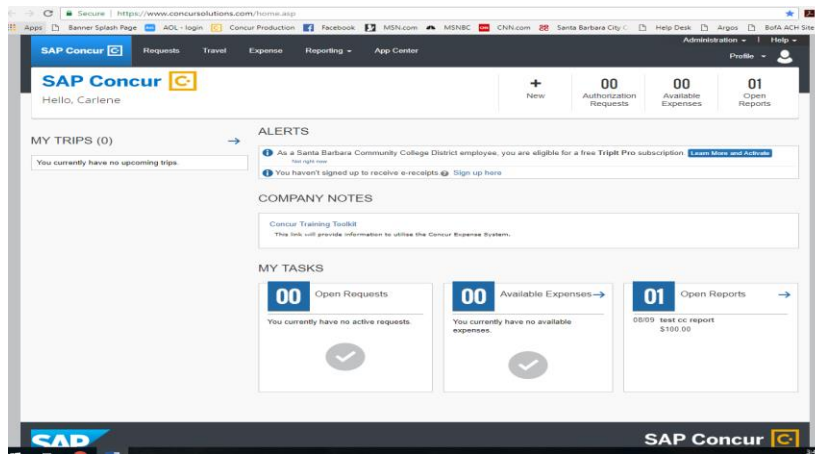
3. Choose the Employee Menu.



4. Choose **Resources** and the following screen will open. Click **SAP Concur** to open up the app.



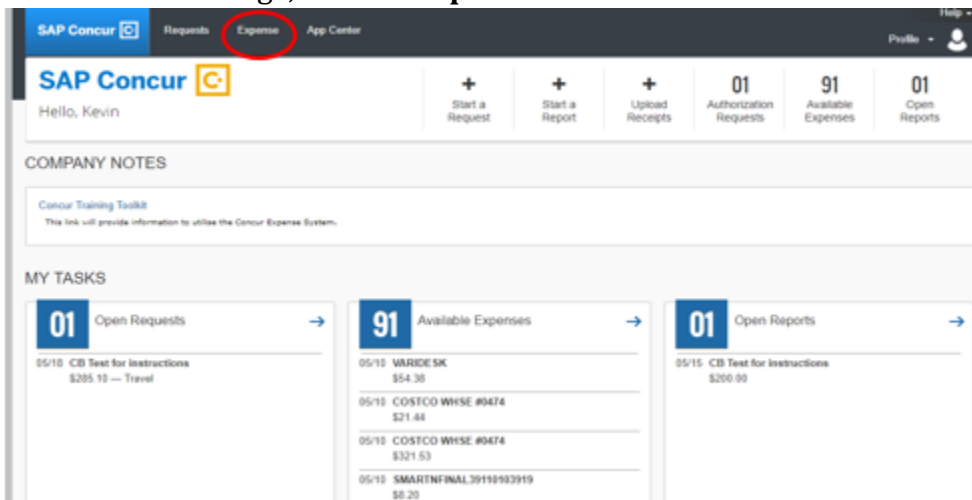
5. Once you are in the app, the screen will look like this:



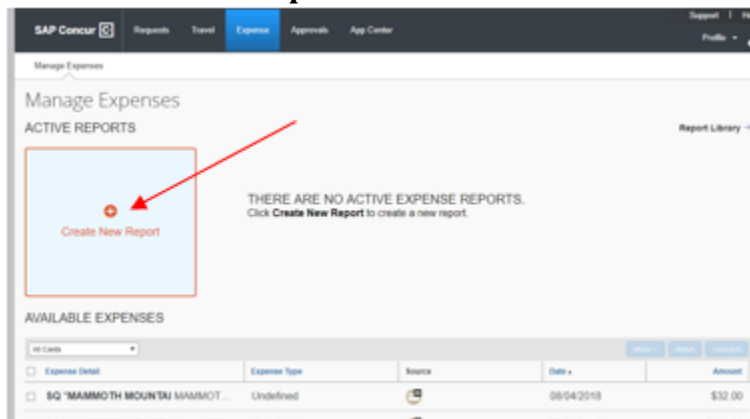
SECTION 2: DISTRICT CREDIT CARDS

2.1 Creating the Expense Report

1. From the Home Page, click on **Expense**.



2. Click **Create New Report**.



- Click on the **Policy** dropdown menu.
Note: the default setting is “SBCC – Travel & Conference”.

Manage Expenses

Create a New Expense Report

Report Header

Policy: ***SBCC-Travel & Conference E**

Report/Trip Name: Report/Trip Start Date: Report/Trip End Date: Report/Trip Purpose:

Employee Type: Trip Type: Does this trip include personal travel?: Number of personal days: Additional Information:

Comment:

Chart: Fund: Org: Program: Activity:

Location:

- Choose “***SBCC-District Card Expense Policy**”.

Create a New Expense Report

Report Header

Policy: ***SBCC-Travel & Conference E**

- *SBCC-Travel & Conference Expense
- *SBCC-District Card Expense Policy

Report/Trip Start Date:

Employee Type: Trip Type:

- Give your report a unique name, for example, *August 2018 Credit Card*.

Manage Expenses

Create a New Expense Report

Report Header

Policy: ***SBCC-District Card Expense Policy**

Report/Trip Name: **August 2018 Credit Card** Report/Trip Start Date: Report/Trip End Date: Report/Trip Purpose: Employee Type:

Trip Type: Additional Information: Comment:

Chart: Fund: Org: Program: Activity:

Location:

Requests

- Fill in **Report/Trip Start Date** and **Report/Trip End Date**. (This should be the first and last days of the month, for example, 08/01/18 and 08/31/18).

Manage Expenses

Create a New Expense Report

Report Header

Policy: SBCC-District Card Expense F

Report/Trip Name: August 2018 Credit Card

Report/Trip Start Date: [Calendar Icon]

Report/Trip End Date: [Calendar Icon]

Report/Trip Purpose: [Dropdown]

Employee Type: [Dropdown]

Trip Type: [Dropdown]

Additional Information: [Text Field]

Comments: [Text Field]

Chart: [Dropdown]

Fund: [Dropdown]

Org: [Dropdown]

Program: [Dropdown]

Activity: [Dropdown]

Location: [Dropdown]

Requests

Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining
<input type="button" value="Add"/> <input type="button" value="Remove"/>					

- On the same screen, click on the **Employee Type** dropdown menu. Choose **District Credit Card**.

Employee Type

[Dropdown Arrow]

| [Dropdown Arrow]

- Classified Management/Staff
- District Credit Card**
- Faculty/Educational Administrator
- School of Extended Learning

Activity

- Next, click on the **Chart** dropdown menu. Choose **(1) SBCC Chart**.

Chart

1 | [Dropdown Arrow]

Fund

2 | [Dropdown Arrow]

Location

Type to search by:

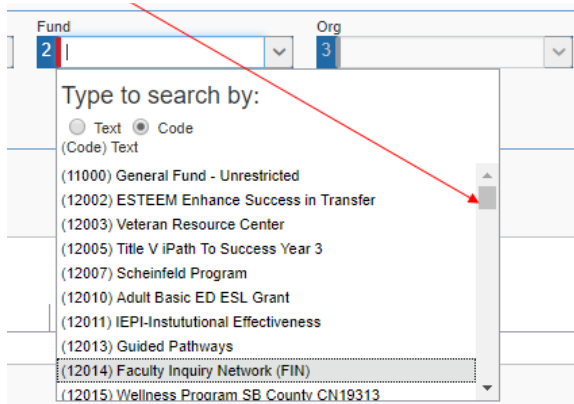
Text Code

(Code) Text

- (1) SBCC Chart**

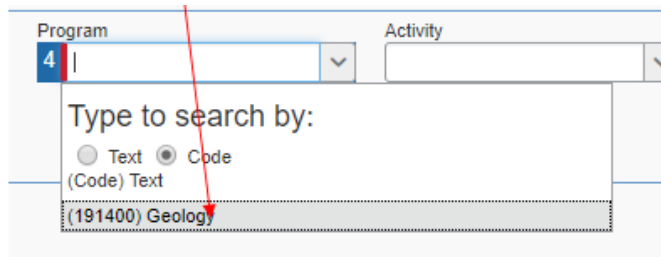
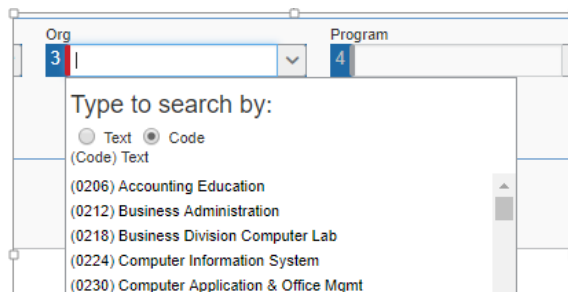
Requests

- Click on the **Fund** dropdown menu. Scroll and pick the appropriate Fund code.



10. Do the same with the **Org** and **Program**. This will create the **Header** for the expense report.

NOTE: Activity and Location are only used in certain situations. If you need one or both, choose your Activity and/or Location the same way you choose your Fund, Org, and Program.



11. When done, click **Next**.

Chart: (1) SBCC Chart
Fund: (11000) General Fund - Unre
Org: (1644) Earth & Planetary Sci
Program: (1191400) Geology
Activity:

Requests

Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining

Buttons: Add, Cancel, Move (highlighted with red arrow)

12. The **Available Expenses** screen will appear. Click the box for any of the expenses that are on the period of the report you are creating.

Manage Expenses

August 2018 Credit Card

Buttons: + New Expense, Import Expenses, Details, Receipts, Print / Email

Available Expenses

Expense Detail	Expense Type	Source	Date	Amount
<input type="checkbox"/> SQ *MAMMOTH MOUNTAIN MAMMOTH...	Undefined		08/04/2018	\$32.00
<input type="checkbox"/> SQ *MAMMOTH MOUNTAIN MAMMOTH...	Undefined		08/04/2018	\$119.68
<input type="checkbox"/> SQ *EASTERN SIERRA LONE PINE, CA	Undefined		08/04/2018	\$27.96
<input type="checkbox"/> SIERRA SUNDANCE WHOLE FOOD MA...	Breakfast		08/04/2018	\$79.14
<input type="checkbox"/> EXXONMOBIL 9689951 LONE PINE, CA	Car Rental Fuel		08/04/2018	\$5.92
<input type="checkbox"/> DIY HOME CENTER #01 MA MAMMOT...	Undefined		08/04/2018	\$32.73

13. Once you click on the appropriate expenses, the **Move** button will appear. Click the down arrow of the **Move** button to view the dropdown list.

Manage Expenses

August 2018 Credit Card

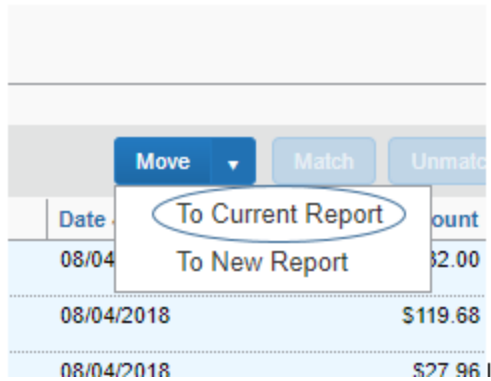
Buttons: + New Expense, Import Expenses, Details, Receipts, Print / Email

Available Expenses

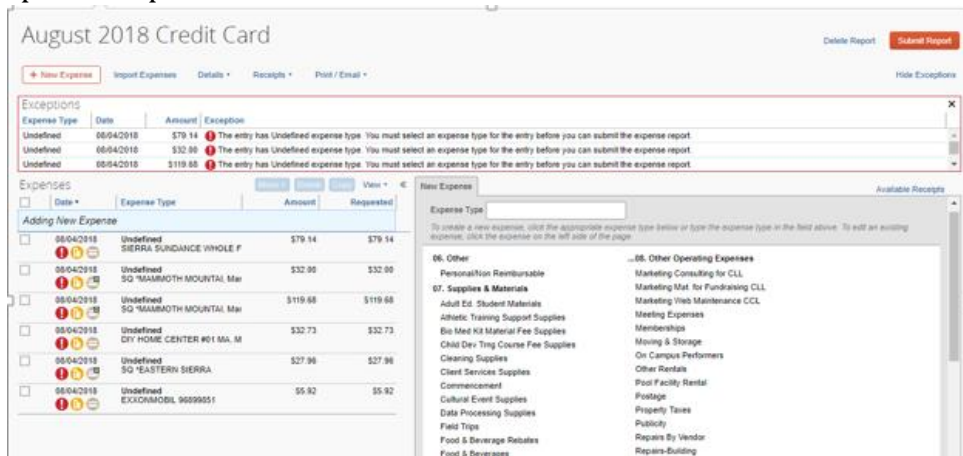
Expense Detail	Expense Type	Source	Date	Amount
<input checked="" type="checkbox"/> SQ *MAMMOTH MOUNTAIN MAMMOTH...	Undefined		08/04/2018	\$32.00
<input checked="" type="checkbox"/> SQ *MAMMOTH MOUNTAIN MAMMOTH...	Undefined		08/04/2018	\$119.68
<input checked="" type="checkbox"/> SQ *EASTERN SIERRA LONE PINE, CA	Undefined		08/04/2018	\$27.96
<input checked="" type="checkbox"/> SIERRA SUNDANCE WHOLE FOOD MA...	Breakfast		08/04/2018	\$79.14
<input checked="" type="checkbox"/> EXXONMOBIL 9689951 LONE PINE, CA	Car Rental Fuel		08/04/2018	\$5.92
<input checked="" type="checkbox"/> DIY HOME CENTER #01 MA MAMMOT...	Undefined		08/04/2018	\$32.73

Buttons: Move (highlighted with red arrow), Search, Cancel

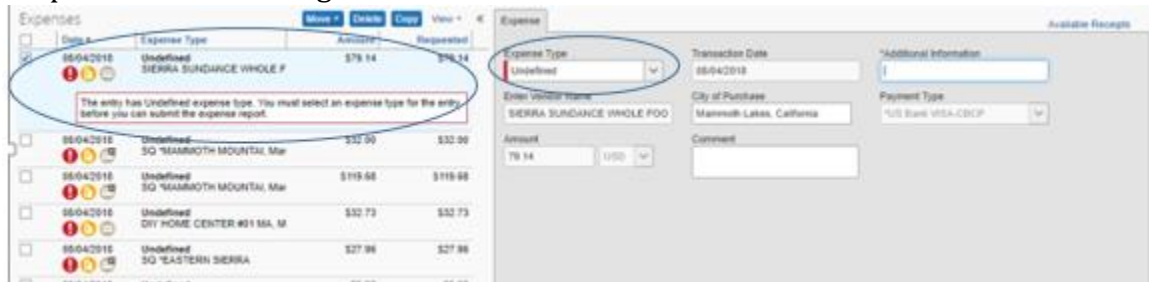
14. Choose **"To Current Report"** to assign the expenses to the report you are creating.



15. Your screen will change and you will now be able to review and categorize each specific expense.



16. Click on the first expense on the left side. Next, click on the **Expense Type** dropdown list on the right side.



17. Scroll to **choose** the appropriate Expense Type (you will not see the Account numbers).

Expense Type: Undefined Transaction Date: 08/04/2018

- 06. Other
 - Personal/Non Reimbursable
- 07. Supplies & Materials
 - Adult Ed. Student Materials
 - Athletic Training Support Supplies
 - Bio Med Kit Material Fee Supplies
 - Child Dev Trng Course Fee Supplies
 - Cleaning Supplies
 - Client Services Supplies

18. Next, click on the **Report/Trip Purpose** dropdown list and choose **District Credit Card**.

August 2018 Credit Card

Exceptions

Expense Type	Date	Amount	Exception
Undefined	08/04/2018	\$79.14	The entry has Undefined expense type. You must select an expense type for the entry before you can submit the expense report.
Undefined	08/04/2018	\$32.00	The entry has Undefined expense type. You must select an expense type for the entry before you can submit the expense report.
Undefined	08/04/2018	\$119.66	The entry has Undefined expense type. You must select an expense type for the entry before you can submit the expense report.

Expenses

Date	Expense Type	Amount	Requested
08/04/2018	Undefined SIERRA SUNDANCE WHOLE F	\$79.14	\$79.14
08/04/2018	Undefined SG "MAMMOTH MOUNTAIN, Ma	\$32.00	\$32.00
08/04/2018	Undefined SG "MAMMOTH MOUNTAIN, Ma	\$119.66	\$119.66

Expense Form:

Expense Type: Field Trips Employee Type: District Credit Card Transaction Date: 08/04/2018

Report/Trip Purpose: **District Credit Card**

Additional Information: [Empty]

City of Purchase: Mammoth Lakes, California

Payment Type: US Bank VISA-CSCOP Amount: 79.14 USD

Report/Trip Purpose: District Credit Card

Additional Information: [Empty]

- Conference Attendee
- Conference Participant
- Development
- District Credit Card**
- Faculty Recruiting
- Meeting
- Other
- Student Recruiting
- Study Abroad
- Teacher Supervision
- Workshop/Seminar/Training

2.2 Attaching the Receipts

1. After categorizing the credit card expenses, click **Save**. Then click on **Attach Receipt**.

06/04/2018	Undefined	SIERRA SUNDANCE WHOLE F	\$79.14	\$79.14
The entry has Undefined expense type. You must select an expense type for the entry before you can submit the expense report.				
06/04/2018	Undefined	SQ 'MAMMOTH MOUNTAIN Mar	\$32.00	\$32.00
06/04/2018	Undefined	SQ 'MAMMOTH MOUNTAIN Mar	\$119.68	\$119.68
06/04/2018	Undefined	DIY HOME CENTER #01 MA, M	\$32.73	\$32.73
06/04/2018	Undefined	SQ 'EASTERN SIERRA	\$27.96	\$27.96
06/04/2018	Undefined	EXXONMOBIL 9699951	\$5.92	\$5.92
TOTAL AMOUNT			\$297.43	\$297.43
TOTAL REQUESTED			\$297.43	

Field Type	Employee Type	Transaction Date
Report/Trip Purpose	Additional Information	Enter Vendor Name
City of Purchase	Payment Type	Amount
Comment		

Buttons: Save, Browse, Attach Receipt, Cancel

2. The box pictured below will pop up. Click on **Browse** to upload and attach a receipt from your computer/device.

*NOTE: If you have already saved the receipt in the Concur app without assigning to an expense, you can **Attach** the receipt from the Available Receipts area.*

Attach Receipt [X]

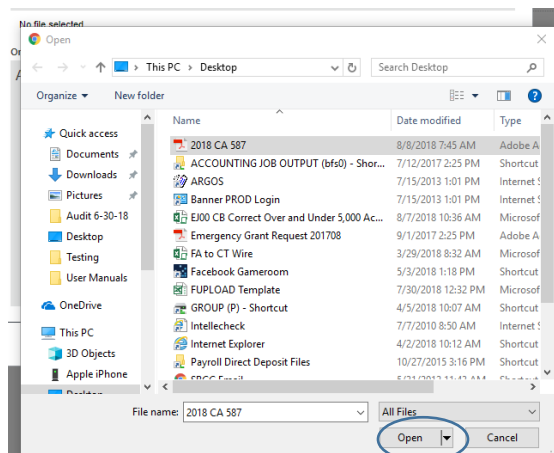
Click Browse and select a .png, .jpg, .jpeg, .pdf, .html, .tif or .tiff file for upload. 5 MB limit per file.
 No Receipt? Create a missing Receipt Affidavit here.

File Selected for uploading: Browse... Attach

No file selected

Or choose an image from your Available Receipts. Attach

3. Locate your receipt on your computer (if you are using a Mac your screen will look different). Click on **Open** to upload the receipt. Then click on **Attach**.

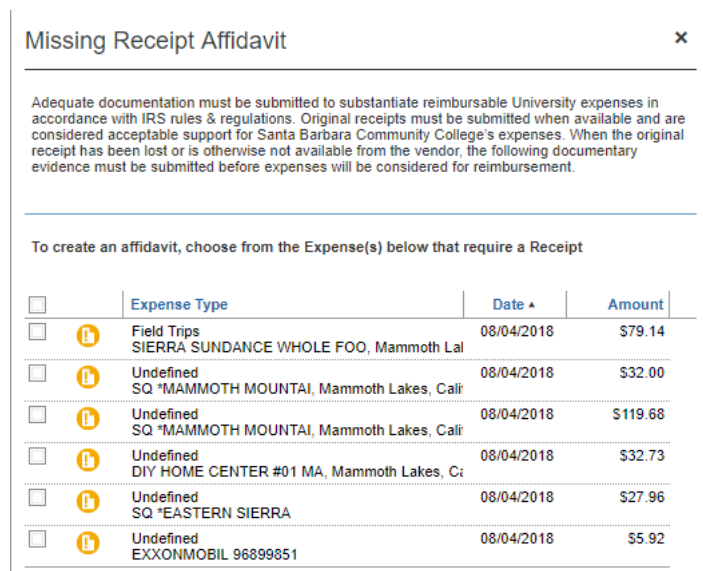







4. If you did not receive a receipt or it has been lost, you will need to create a **Missing Receipt Affidavit** by clicking on the link (please see below).



5. When creating a Missing Receipt Affidavit, you will need to choose the expenses you are missing a receipt for.



6. Once you have chosen the appropriate expenses for the Missing Receipt Affidavit, read the statements and click **Accept & Create**.

<input checked="" type="checkbox"/>		Undefined DIY HOME CENTER #01 MA, Mammoth Lakes, Ca	08/04/2018	\$32.73
<input type="checkbox"/>		Undefined SQ *EASTERN SIERRA	08/04/2018	\$27.96
<input checked="" type="checkbox"/>		Undefined EXXONMOBIL 96899851	08/04/2018	\$5.92

I acknowledge that this expense report contains legitimate University expenses incurred by me on behalf of Santa Barbara Community College's benefit, and are allowable expenses as defined by Santa Barbara Community College Travel Policy. I further certify that one or more of the related receipts applicable to this expense report are no longer available.

- When you have attached a receipt, the receipt icon will turn blue and the Receipt Image tab will appear. You can see your receipt by hovering over the icon or clicking on the tab.

	Date	Expense Type	Amount	Requested
<input checked="" type="checkbox"/>	08/04/2018	Field Trips SIERRA SUNDANCE WHOLE F	\$79.14	\$79.14
<input type="checkbox"/>	08/04/2018	Undefined SQ *MAMMOTH MOUNTAIN Mar	\$32.00	\$32.00
<input type="checkbox"/>	08/04/2018	Undefined SQ *MAMMOTH MOUNTAIN Mar	\$119.68	\$119.68

- Click on the next expense and repeat the steps you used for the first expense until you have completed the information for all the expenses.

2.3 Itemizing Expenses to Different Expense Codes of Same Fund/Org/Program

Concur gives you the ability to itemize (split) expenses (e.g. adding a tip amount that was paid via cash) via the **Itemize** feature.

Expenses can only be itemized if they are in the same Fund/Org/Program (please see [Section 2.4 Allocating Expenses](#) if you need expenses to be split into different Funds, Orgs, or Programs). The steps below are for itemizing expenses.

- Open the expense or create a New Expense. Then click on the **Itemize** button on the bottom right of the screen.

Manage Expenses

Itemize Test Report

[+ New Expense](#)
[Import Expenses](#)
[Details](#)
[Receipts](#)
[Print / Email](#)

[Delete Report](#)
[Submit Report](#)

Hide Exceptions

Exceptions

Expense Type	Date	Amount	Exception
N/A			Please provide conference agenda/registration receipt that shows any meal inclusions. Expenses are subject to review and approval by Supervisor, and if deemed of personal nature, will not be reimbursed.

Expenses	Date	Expense Type	Amount	Requested
<input checked="" type="checkbox"/>	06/01/2018	Car Service/Limousine	\$55.00	\$55.00

Expense

Expense Type	Employee Type	Transaction Date
Car Service/Limousine	Classified Management/Staff	06/01/2018
Report/Trip Purpose	Additional Information	Enter Vendor Name
Conference Attendee		
City of Purchase	Payment Type	Amount
	Out of Pocket	\$5.00 USD
Comment		
<input type="text"/>		

[Save](#)
[Itemize](#)
[Allocate](#)
[Attach Receipt](#)
[Cancel](#)

TOTAL AMOUNT: \$55.00 TOTAL REQUESTED: \$55.00

- This will take you to a new screen (see below). Click on the **Expense Type** dropdown list.

Manage Expenses

Itemize Test Report

[+ New Expense](#)
[Import Expenses](#)
[Details](#)
[Receipts](#)
[Print / Email](#)

[Delete Report](#)
[Submit Report](#)

Hide Exceptions

Exceptions

Expense Type	Date	Amount	Exception
N/A			Please provide conference agenda/registration receipt that shows any meal inclusions. Expenses are subject to review and approval by Supervisor, and if deemed of personal nature, will not be reimbursed.

Expenses	Date	Expense Type	Amount	Requested
<input type="checkbox"/>	06/01/2018	Car Service/Limousine	\$55.00	\$55.00

New Itemization

Expense Type: Choose an expense type

Total Amount: \$55.00 | Itemized: \$0.00 | Remaining: \$55.00

- Next, scroll through and **choose** your expense type.

New Itemization

Expense Type

- Lunch
- 04. Meals & Entertainment
- Catering
- Group Meals/Entertainment +10 Attendees
- Group Meals/Entertainment 10 + Attendees
- 05. Fees
- Booking Fees
- Passport/Visa Fees
- 06. Other
- Classified Management/Staff
- Faculty
- Other Travel Expenses
- Personal/Non Reimbursable
- School of Extended Learning
- Seminar Registration Fees
- Tips/Gratuities

- Fill in the amount for the first expense type (you will have at least two) and click Save.

Exceptions

Expense Type	Date	Amount	Exception
N/A			Please provide conference agenda/registration receipt that shows any meal inclusions. Expenses are subject to review and approval by Supervisor, and if deemed of personal nature, will not be reimbursed.
Car Service/Li.	08/01/2018	\$55.00	The amount approved was less than the transaction amount

Expenses

Date	Expense Type	Amount	Requested
08/01/2018	Car Service/Limousine	\$55.00	\$50.00

Adding New Itemization

Date	Expense Type	Amount	Requested
08/01/2018	Car Service/Limousine	\$50.00	\$50.00

Summary: TOTAL AMOUNT \$50.00, TOTAL REQUESTED \$50.00

Form Fields: Expense Type: Tips/Gratuities, Employee Type: Classified Management Staff, Transaction Date: 08/01/2018, Report/Trip Purpose: Conference Attendee, Payment Type: Out of Pocket, Amount: \$.00, USD.

Buttons: Save, Allocate, Cancel

- Repeat until all the expense types are done and the subtotal adds up to the whole expense amount. Then click **Save**. Your screen will now include the itemized amounts and update totals accordingly.

Itemize Test Report

Expenses

Date	Expense Type	Amount	Requested
08/03/2018	Hotel Best Western International, Anaheim	\$500.00	\$500.00
08/01/2018	Car Service/Limousine	\$55.00	\$55.00
08/01/2018	Car Service/Limousine	\$50.00	\$50.00
08/01/2018	Tips/Gratuities	\$5.00	\$5.00

Summary: TOTAL AMOUNT \$555.00, TOTAL REQUESTED \$555.00

Form Fields: Expense Type: Car Service/Limousine, Employee Type: Classified Management Staff, Transaction Date: 08/01/2018, Report/Trip Purpose: Conference Attendee, Payment Type: Out of Pocket, Amount: \$5.00, USD.

Buttons: Save, Add Itemization, Attach Receipt, Cancel

2.4 Allocating Expenses to Different Funds, Orgs, Programs, and/or Activities

If you need to split expenses between two different funds, organizations, or programs, you will need to allocate expenses using the **Allocate** feature. The steps below will help guide you through the process:

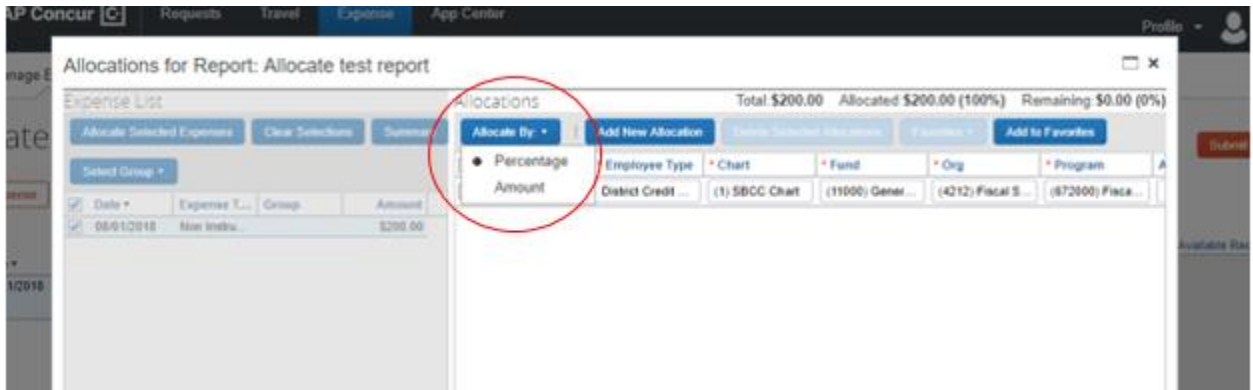
1. First add or open the expense. Then click on **Allocate**.

The screenshot shows the 'Allocate test report' form in SAP Concur. The form is titled 'Allocate test report' and has a 'New Expense' tab selected. The form contains various fields for expense details, including Expense Type (Non Instructional Supplies), Employee Type (District Credit Card), Transaction Date (05/01/2018), Report/Tag Purpose (District Credit Card), City of Purchase, Payment Type (Out of Pocket), and Amount (200.00 USD). The 'Allocate' button is circled in red.

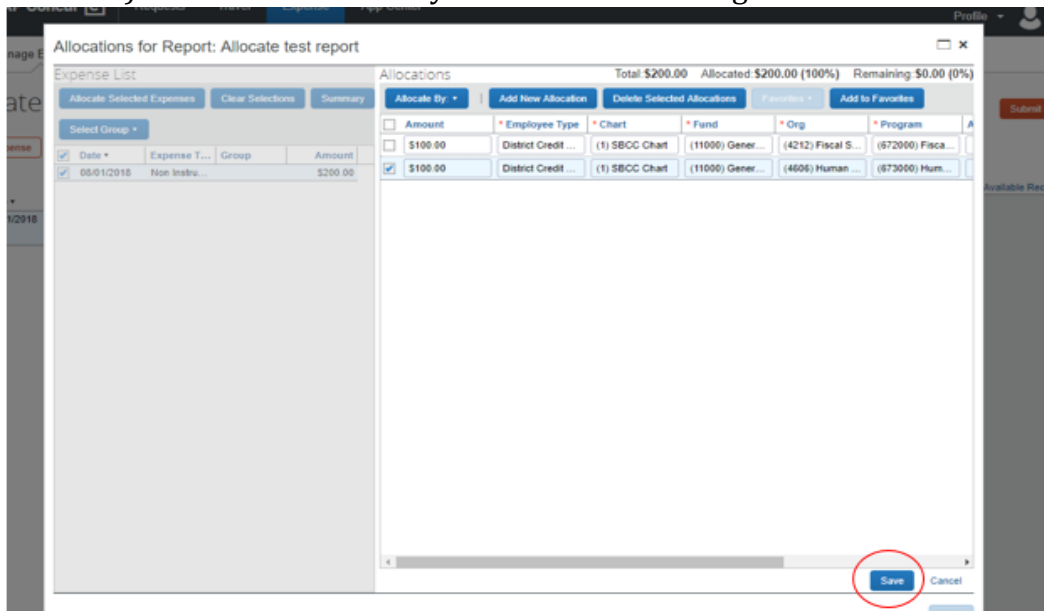
2. The Allocation screen will open up.

The screenshot shows the 'Allocations for Report: Allocate test report' screen in SAP Concur. The screen displays an 'Expense List' and an 'Allocations' table. The 'Expense List' has one entry: 05/01/2018, Non Instru..., \$200.00. The 'Allocations' table shows a single allocation: 100% to District Credit Card, (1) SBCC Chart, (11000) Gener..., (4212) Fiscal S..., (072000) Fisca....

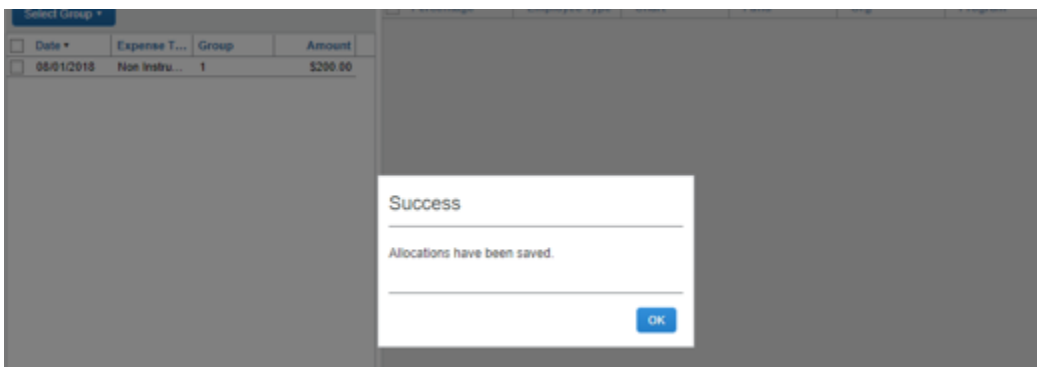
- Click on the **Allocate By**. You will get a dropdown list. Pick either **Percentage** or **Amount** as your preferred method to allocate your expense(s).



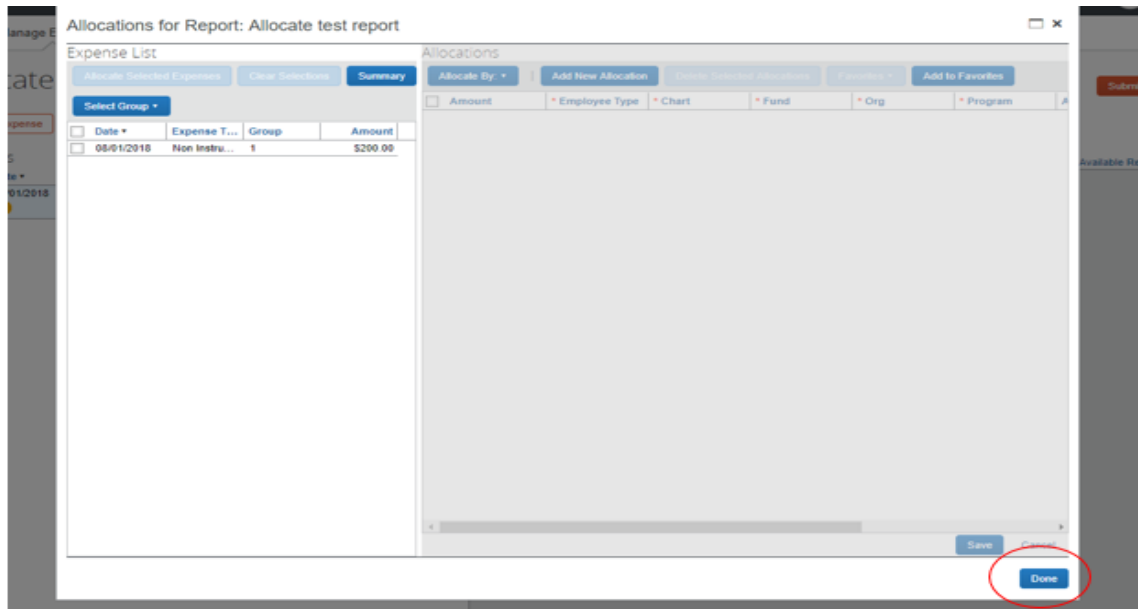
- Complete each separate line for each Fund/Org/Program combination where your expense needs to go (new lines will be created accordingly as you allocate the amounts). Click on **Save** when you are done allocating.



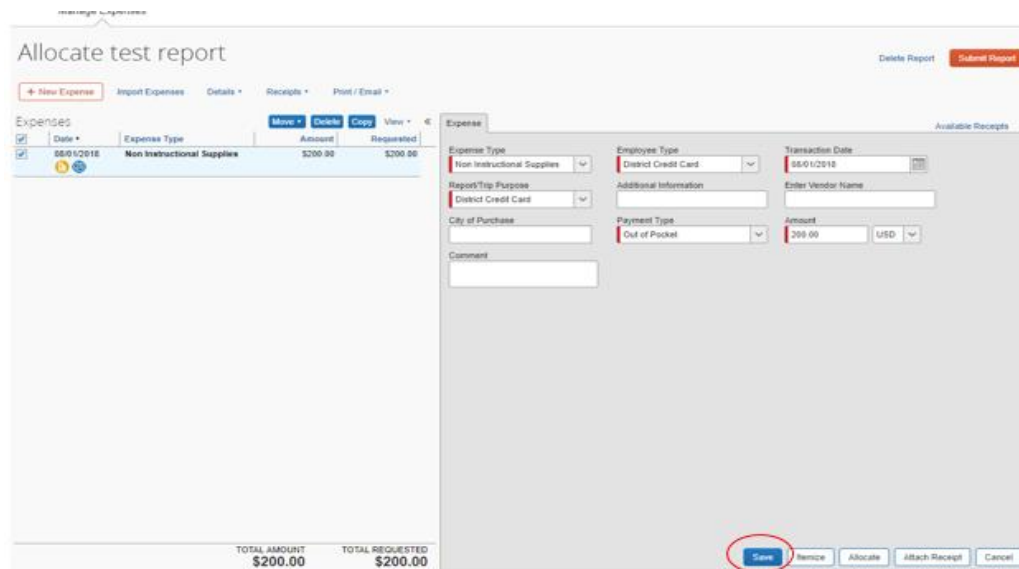
- A confirmation screen will then pop up. Click OK.



7. On the next screen, click **Done**.

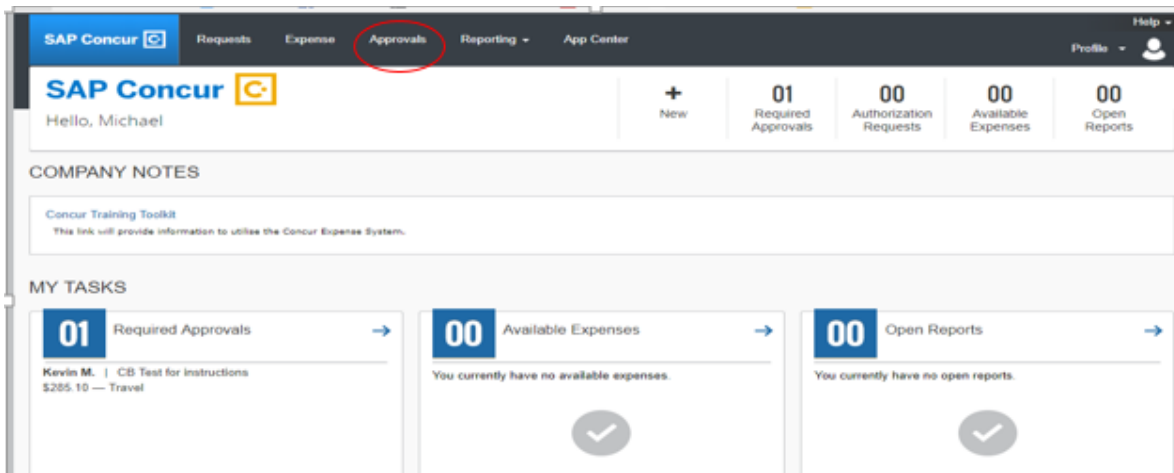


8. On the next screen, click **Save** and you are done Allocating.

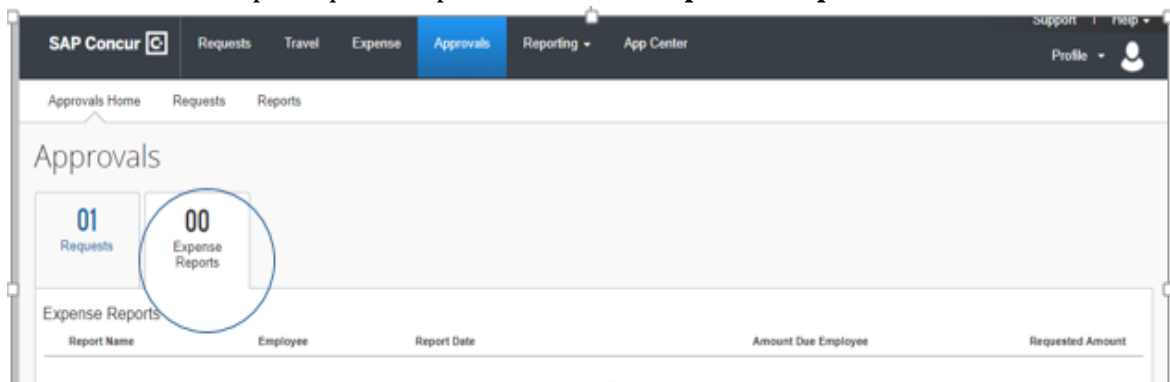


2.5 Approving an Expense Report

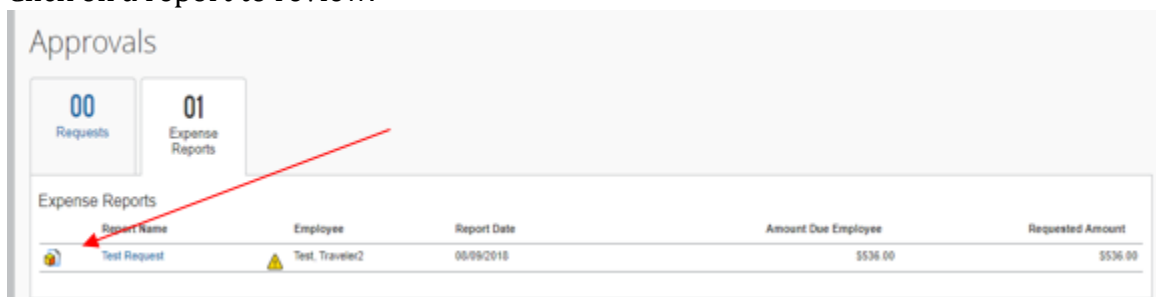
1. From the Welcome Screen, click on **Approvals**.



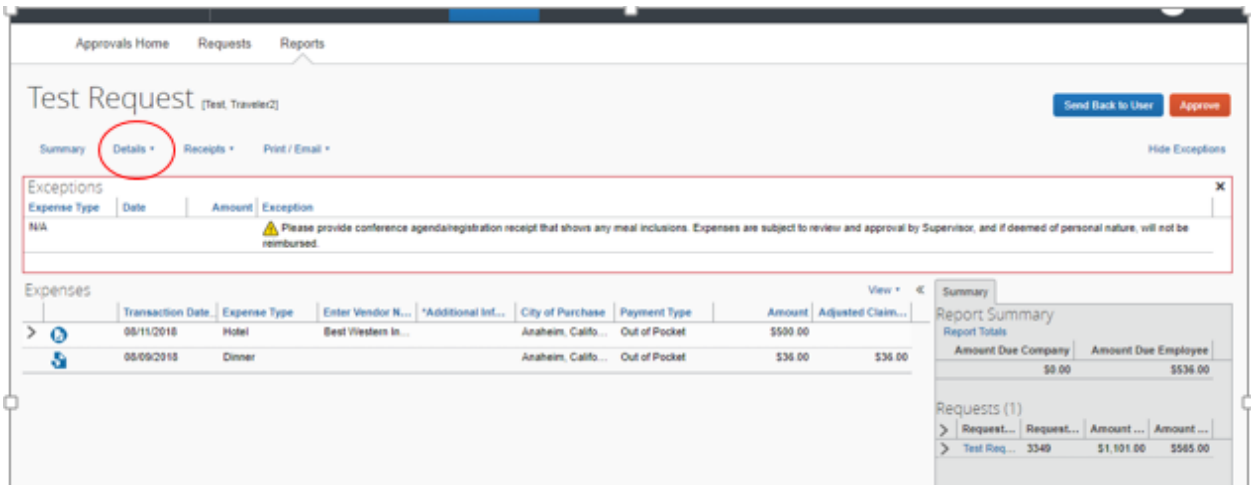
2. Your screen will open up new options. Choose **Expense Reports**.



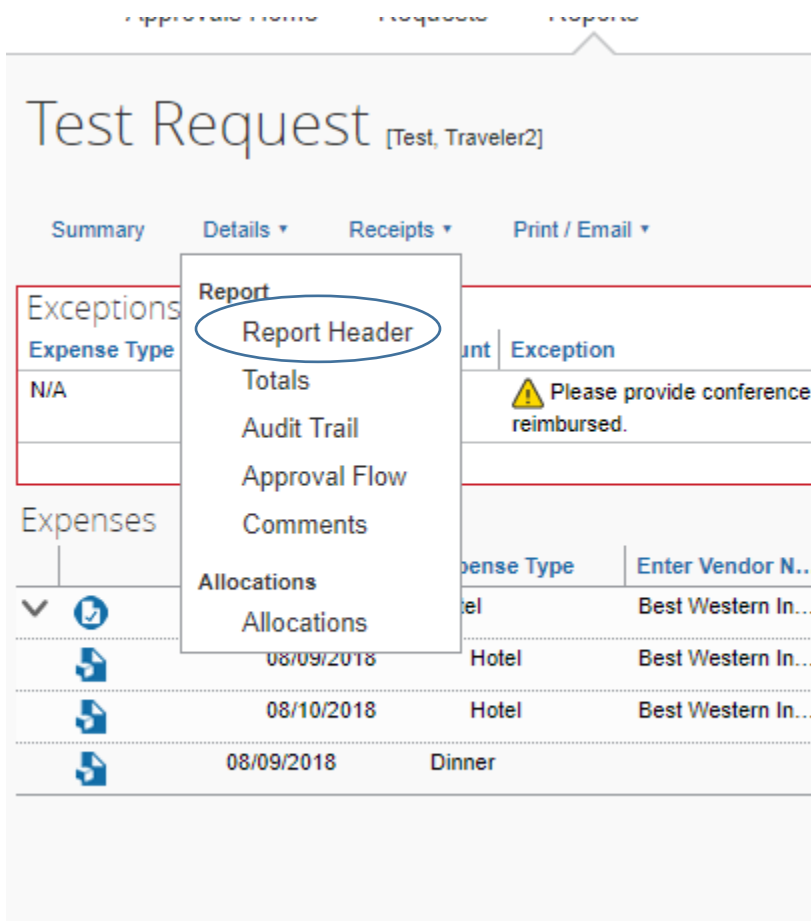
3. Click on a report to review.



4. Your screen will open up new options. Click on the **Details** menu to get a dropdown list.



5. In the Details dropdown list, choose **Report Header**.



6. Review the Report Header for accuracy. Then click **Save**.

Report header for: Test Request

Policy: *SBCC-TEST USERS-Travel & [v]

Report/Trip Name: Test Request | Report/Trip Start Date: 08/09/2018 | Report/Trip End Date: 08/11/2018 | Report/Trip Purpose: Conference Attendee

Employee Type: Faculty/Educational Administrator | Trip Type: In-State | Does this trip include personal travel?: No | Number of personal days: 0

Additional Information: [] | Comment: []

Chart: (1) SBCC Chart | Fund: (11000) General Fund - Unrestricted | Org: (0206) Accounting Education | Program: (050200) Accounting

Activity: [] | Location: []

Report Id: C51A8745EB4C44B1AE17 | Report Key: 2105 | User Name: Test, Traveler2 | Report Currency: US, Dollar

Receipts Received: Yes [v] | Submit Date: 08/09/2018 | Approval Status: Pending Budget/Cost Object Approv | Payment Status: Not Paid

Report Total: 536.00 | Personal Expenses: 0.00 | Amount Not Approved: 0.00 | Amount Approved: 536.00

Amount College Paid: 0.00 | Amount Due College: 0.00 | Amount Due User: 536.00 | Amount Due College Card: 0.00

Total Amount Claimed: 536.00

[Save] [Cancel]

7. Go through and review each of the expenses in the Report for accuracy.

Test Request [Test, Traveler2] [Send Back to User] [Approve]

Summary Details Receipts Print / Email Hide Exceptions

Exceptions

Expense Type	Date	Amount	Exception
N/A			Please provide conference agenda/legislation receipt that shows any meal inclusions. Expenses are subject to review and approval by supervisor, and if deemed of personal nature, will not be reimbursed.

Expenses

Transaction Date	Expense Type	Enter Vendor N...	*Additional Inf...	City of Purchase	Payment Type	Amount	Adjusted Claim...
08/11/2018	Hotel	Best Western In...		Anaheim, Calif...	Out of Pocket	\$500.00	
08/09/2018	Hotel	Best Western In...		Anaheim, Calif...	Out of Pocket	\$250.00	\$250.00
08/10/2018	Hotel	Best Western In...		Anaheim, Calif...	Out of Pocket	\$250.00	\$250.00
08/09/2018	Dinner			Anaheim, Calif...	Out of Pocket	\$36.00	\$36.00

Total Amount: \$500.00 | Reimbursed: \$500.00 | Remaining: \$

Expense Receipt Image Summary

Expense Type: Hotel

Employee Type: Faculty/Educational Administrator

Transaction Date: 08/11/2018

Report/Trip Purpose: Conference Attendee

Additional Information: []

Vendor: Best Western International [v]

City of Purchase: Anaheim, California

Payment Type: Out of Pocket [v]

Amount: []

COST OBJECT APPROVED AMOUNT \$536.00

[Save] [Attach Receipt]

8. Next, review each **receipt** (or affidavit) to ensure expenses are substantiated accordingly.

Test Request [Test, Traveler2] Send Back to User Approve

Summary Details Receipts Print / Email Hide Exceptions

Exceptions

Expense Type	Date	Amount	Exception
N/A			Please provide conference agenda/registration receipt that shows any meal inclusions. Expenses are subject to review and approval by Supervisor, and if deemed of personal nature, will not be reimbursed.

Transaction Date	Expense Type	Enter Vendor N...	*Additional Inf...	City of Purchase	Payment Type	Amount	Adjusted Claim...
08/11/2018	Hotel	Best Western In...		Anaheim, Califo...	Out of Pocket	\$500.00	\$500.00
08/09/2018	Hotel	Best Western In...		Anaheim, Califo...	Out of Pocket	\$250.00	\$250.00
08/10/2018	Hotel	Best Western In...		Anaheim, Califo...	Out of Pocket	\$250.00	\$250.00
08/09/2018	Dinner			Anaheim, Califo...	Out of Pocket	\$36.00	\$36.00

Expense Receipt Image Summary

Total Amount: \$500.00 | Itemized: \$500.00 | Remaining: \$

COST OBJECT APPROVED AMOUNT \$536.00

- Follow the steps above and review each additional expense. If a correction is needed, click on the **Send Back to User** button in the top right of the screen.

Approvals Home Requests Reports

Test Request [Test, Traveler2] Send Back to User Approve

Summary Details Receipts Print / Email Hide Exceptions

Exceptions

Expense Type	Date	Amount	Exception
N/A			Please provide conference agenda/registration receipt that shows any meal inclusions. Expenses are subject to review and approval by Supervisor, and if deemed of personal nature, will not be reimbursed.

Transaction Date	Expense Type	Enter Vendor N...	*Additional Inf...	City of Purchase	Payment Type	Amount	Adjusted Claim...
08/11/2018	Hotel	Best Western In...		Anaheim, Califo...	Out of Pocket	\$500.00	\$500.00
08/09/2018	Hotel	Best Western In...		Anaheim, Califo...	Out of Pocket	\$250.00	\$250.00
08/10/2018	Hotel	Best Western In...		Anaheim, Califo...	Out of Pocket	\$250.00	\$250.00
08/09/2018	Dinner			Anaheim, Califo...	Out of Pocket	\$36.00	\$36.00

Expense Receipt Image Summary

Total Amount: \$500.00 | Itemized: \$500.00 | Remaining: \$

Expense Type: Hotel

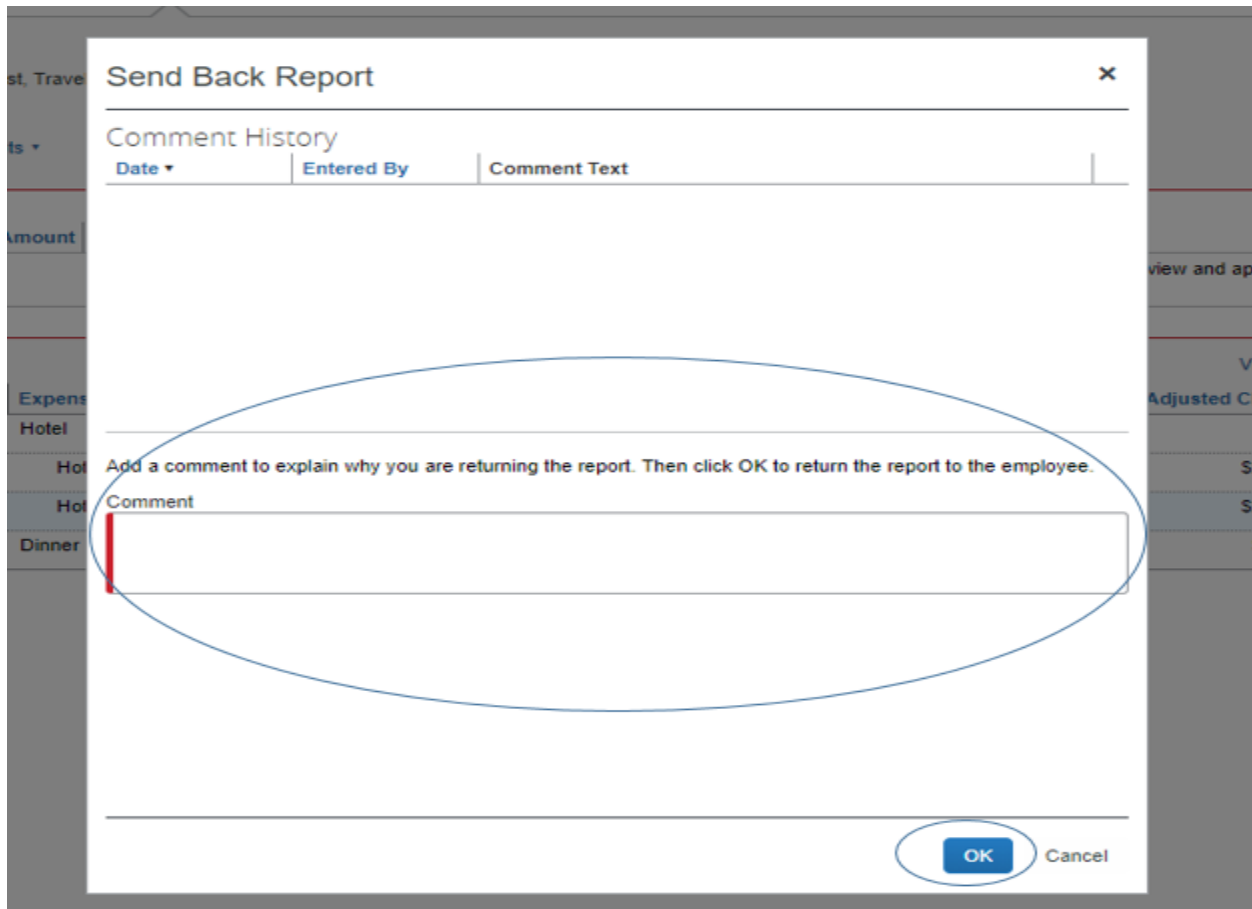
Employee Type: Faculty/Educational Administrator

Transaction Date: 08/10/2018

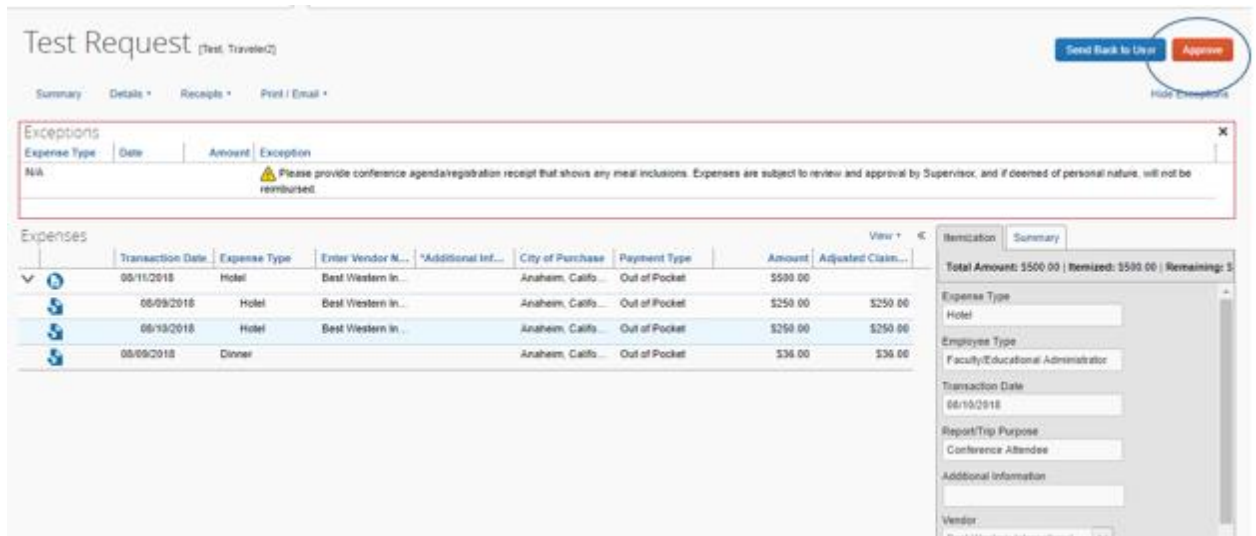
Report Trip Purpose: Conference Attendance

Additional Information:

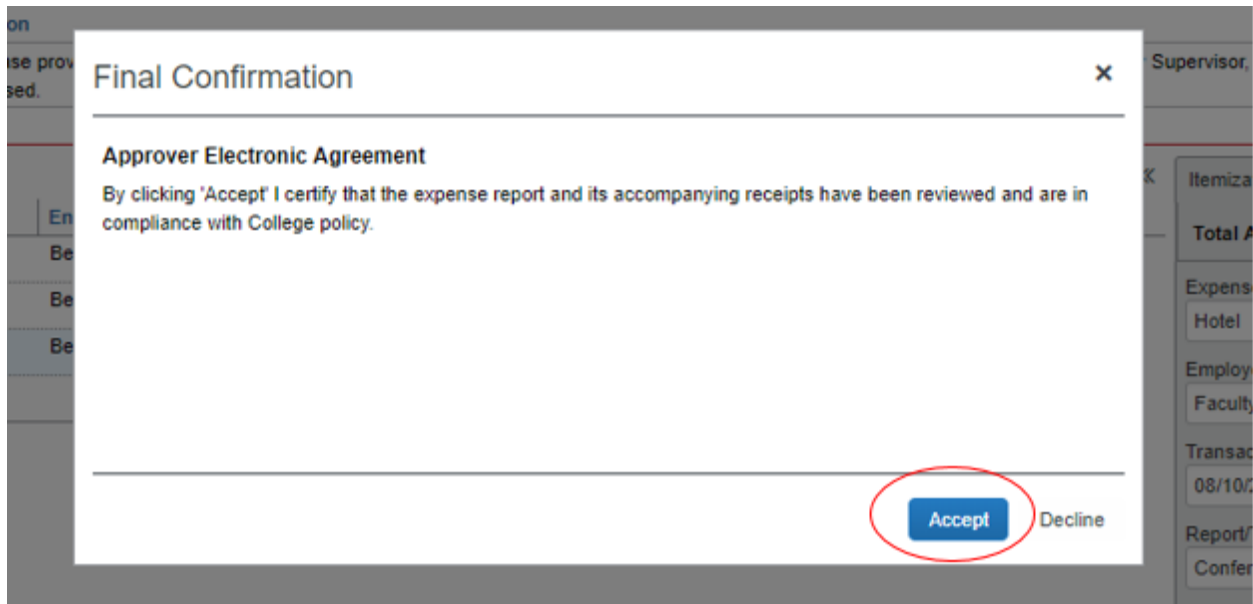
- When sending back a report, please **state the reasons** for the return in the **Comment box** and click on **OK**.



11. If or when everything is correct, click on the Approve button in the upper right of the screen.



12. To confirm your approval, read the agreement and click **Accept**.



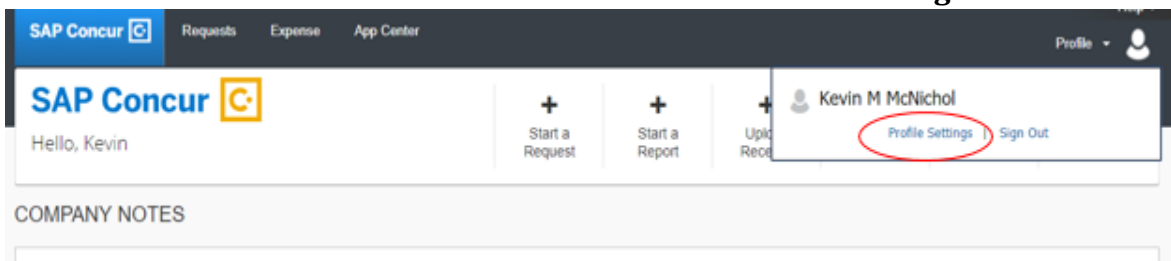
SECTION 3: DELEGATING

3.1 Setting up a Delegate

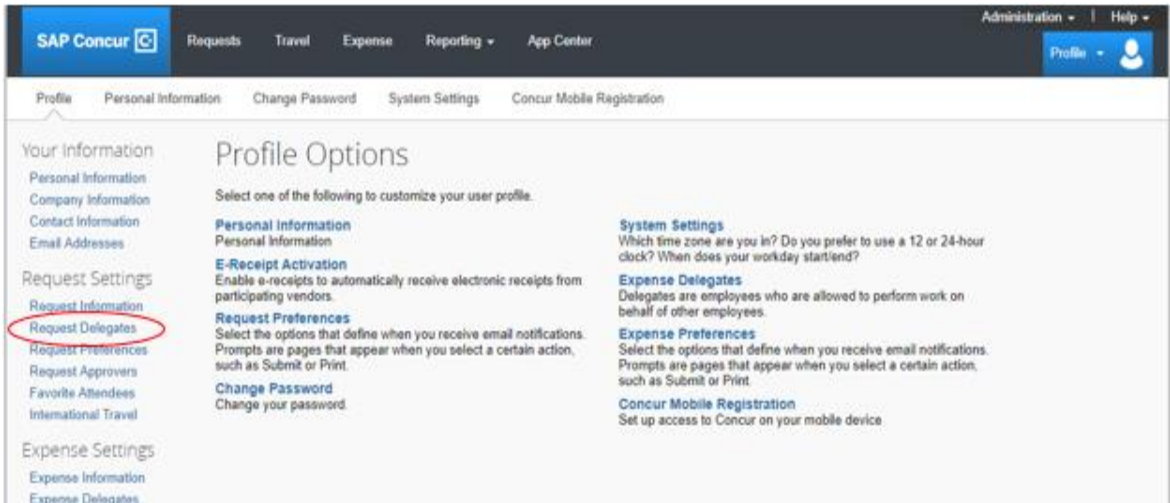
A **delegate** is someone who can create expense reports and travel requests on your behalf based on the permissions you give them.

To set up a delegate:

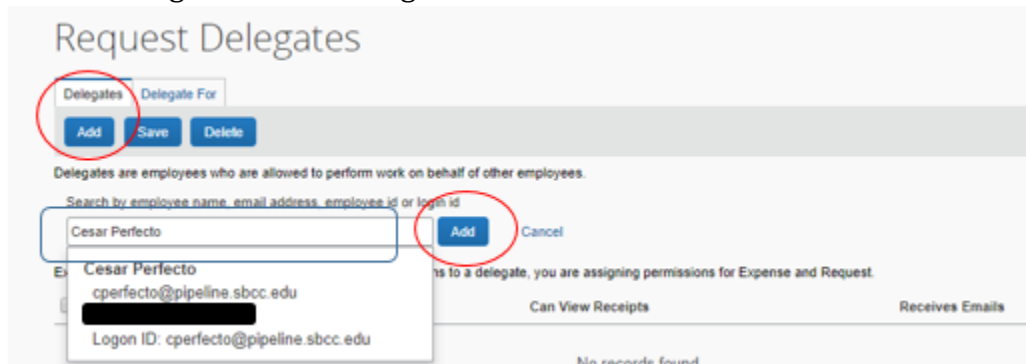
1. From the Welcome Screen click on Profile and choose **Profile Settings**.



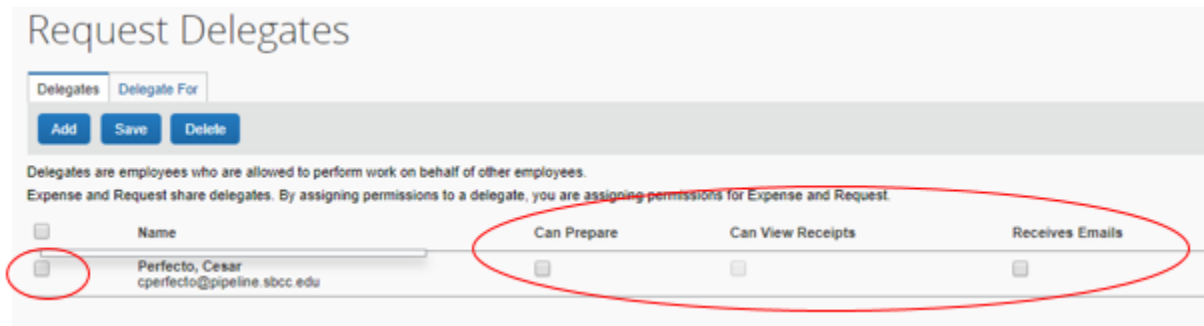
2. Under Request Settings in the left part of the screen, click on **Request Delegates**.



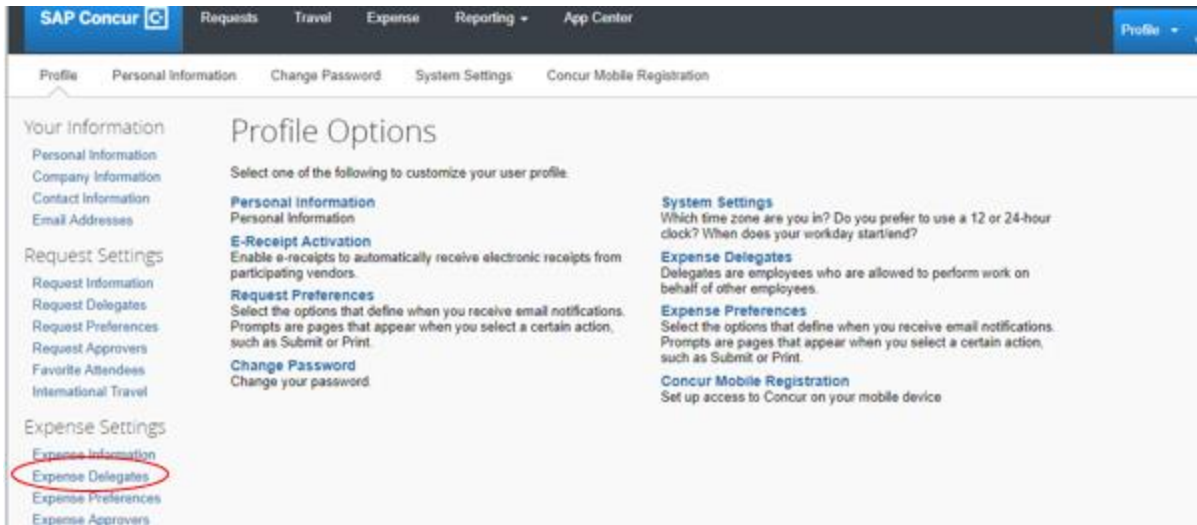
3. Click the **Add** box in the top left to perform a delegate search for the person you want to designate as the Delegate and click on the 2nd **Add** box.



4. To assign permissions to the Delegate, check the box by the person's name and then assign permissions accordingly by clicking on the appropriate permission checkboxes and then click **Save**.



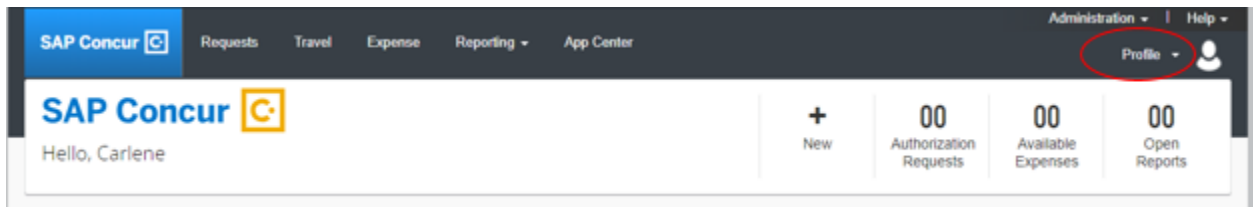
5. This will take you back to the Settings screen. Click on **Expense Delegates**.



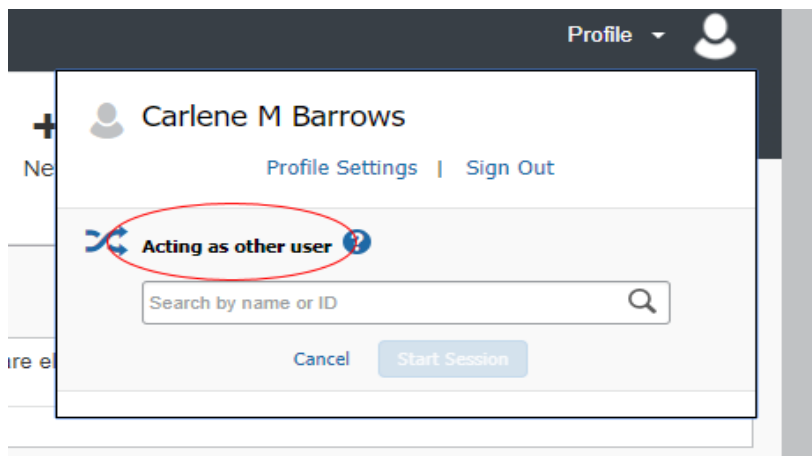
3.2 Acting As a Delegate

A **delegate** is someone who can create expense reports and travel requests on your behalf based on the permissions you give them.

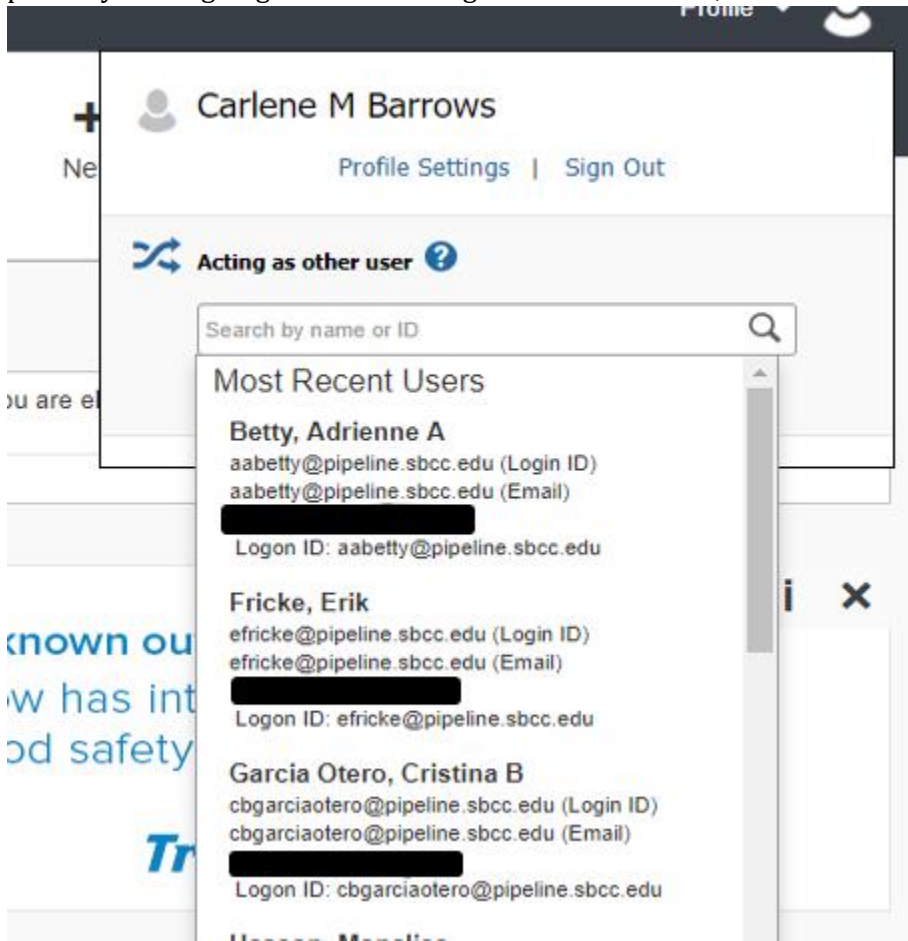
1. From the Welcome Screen click on **Profile**.



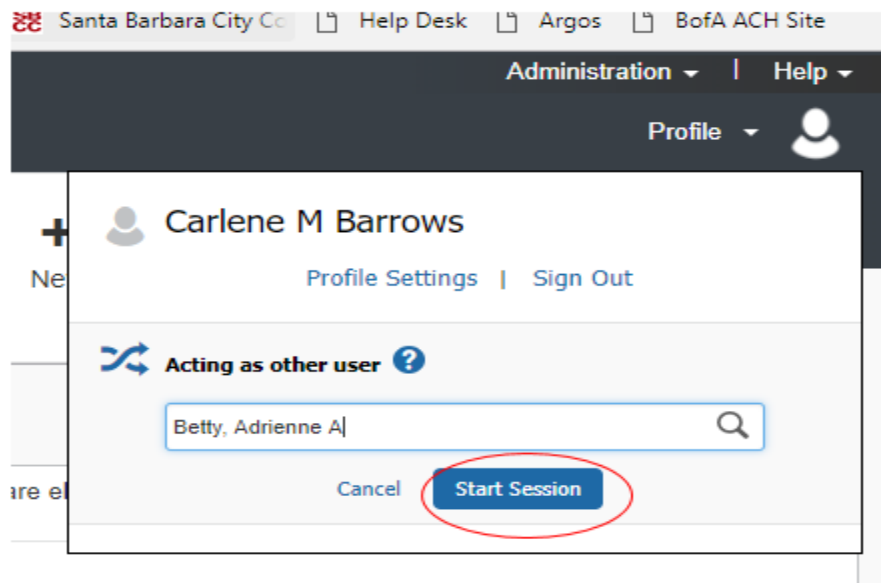
2. The following box will open up. Click on **Acting as other user**.



3. A list of everyone who you have recently acted as Delegate for will open. If the person you are going to act as a Delegate for is on the list, click on their name.

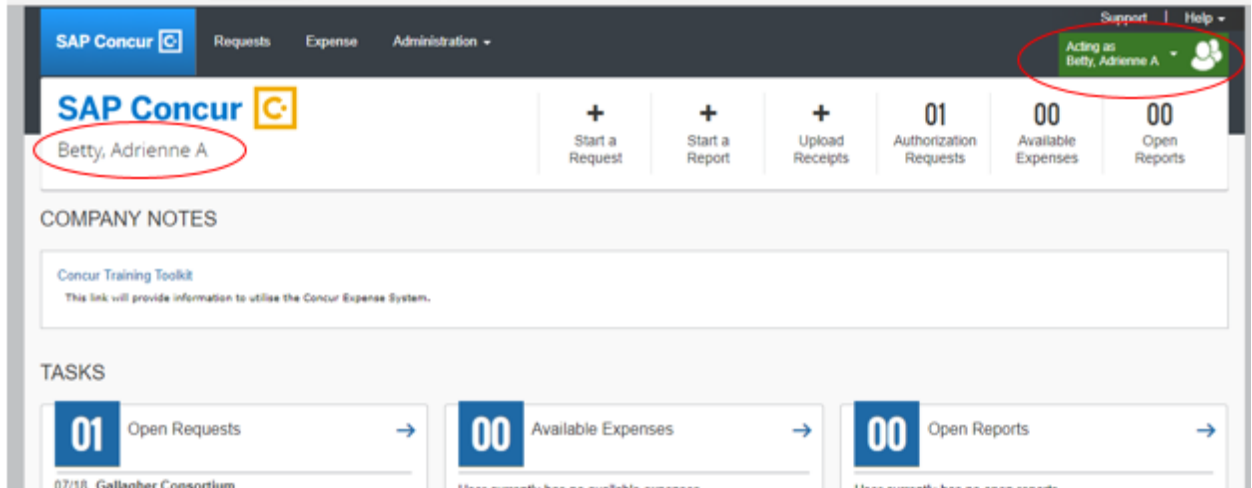


4. If the person you are going to act as a Delegate for is not on the list, start typing their name in. Then click **Start Session**.

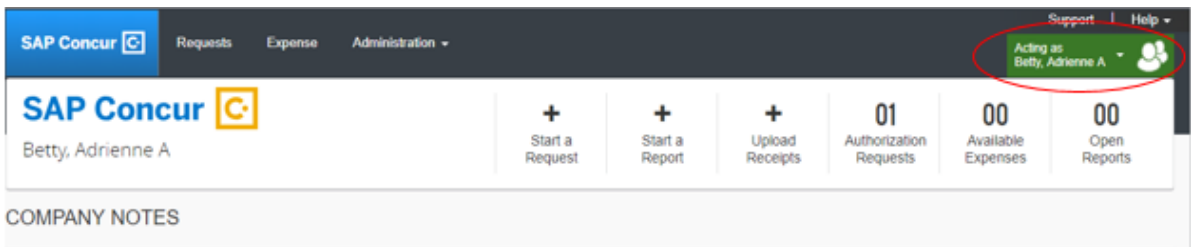


5. You will then go to a new user screen. Note the name below “SAP Concur” and the green box show who you are acting as. If your own name is showing, then you are working on your reports (not theirs).

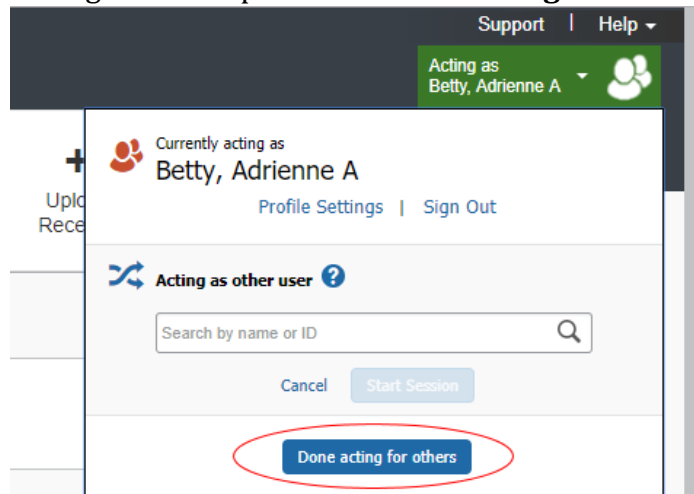
Special Note: you can only as a Delegate if someone has assigned you Delegate permissions.



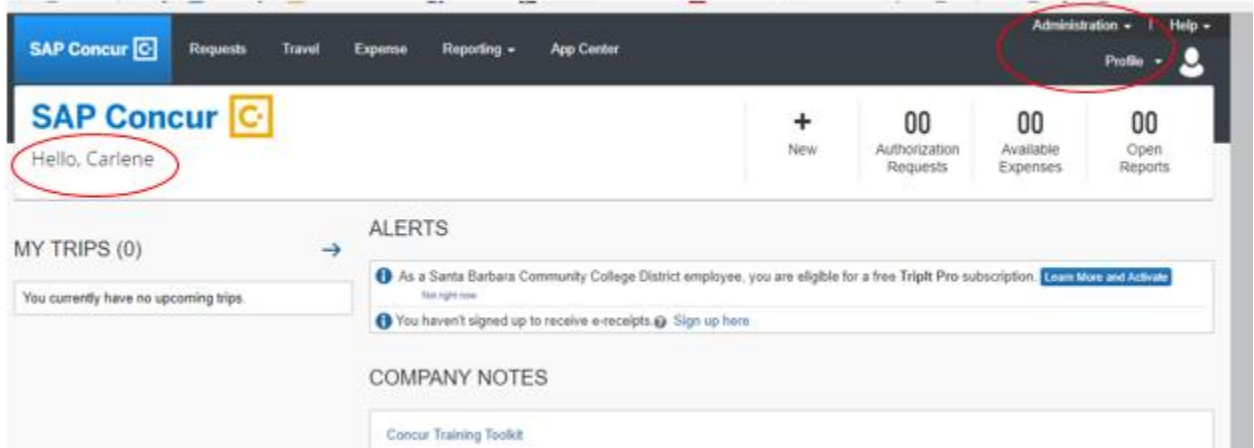
6. When done acting as a delegate, click the green box in the upper right of the screen.



7. The following box will open. Click **Done acting for others**.

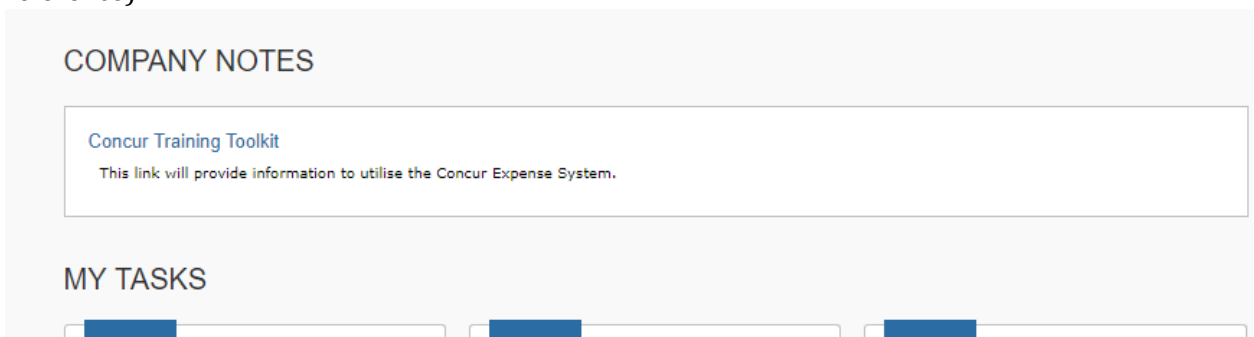


8. You will then return to your account. Check the User and Profile headings to make sure you are in your own profile.



SECTION 4: OTHER RESOURCES

1. Concur Training Toolkit in Pipeline (middle section of Concur homepage; see pic below for reference)



2. Concur Training Website: <https://www.concurtraining.com/pr>
3. A Concur Manual will be available soon on the SBCC Fiscal Services website (<http://www.sbcc.edu/fiscalservices/>).