



Concur Overview

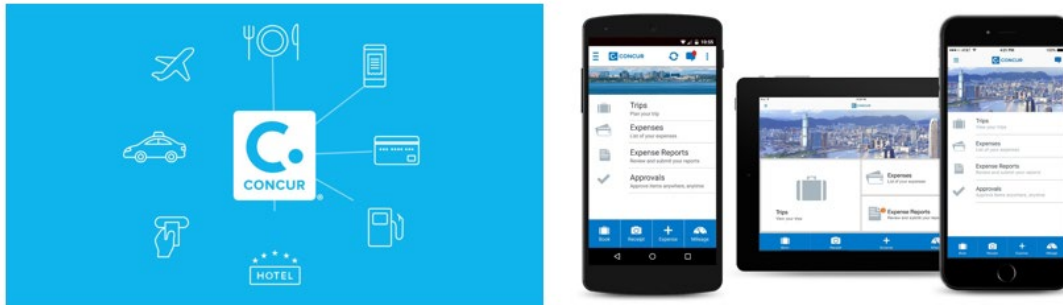


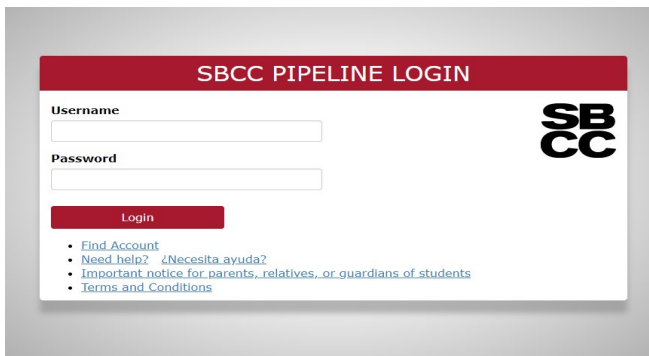
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SECTION 1: LOGGING IN TO CONCUR

1.1 Login to Concur via Desktop

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

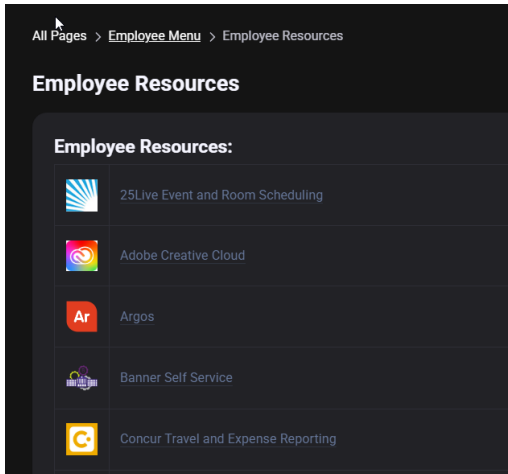


The screenshot shows the 'SBCC PIPELINE LOGIN' page. It features a red header with the text 'SBCC PIPELINE LOGIN'. Below the header, there are two input fields: 'Username' and 'Password'. To the right of these fields is the SBCC logo. Below the input fields is a red 'Login' button. At the bottom of the page, there are four links: 'Find Account', 'Need help? ¿Necesita ayuda?', 'Important notice for parents, relatives, or guardians of students', and 'Terms and Conditions'.

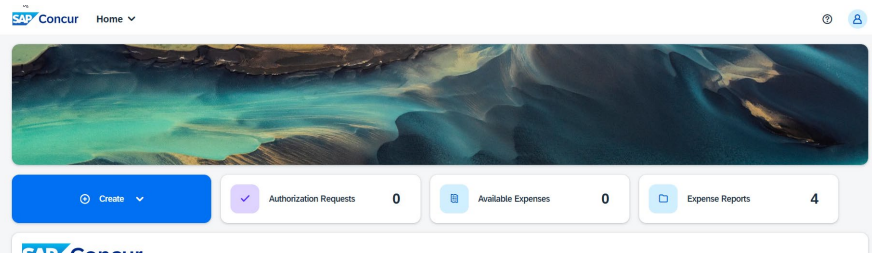
3. Choose Employee Resources.



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



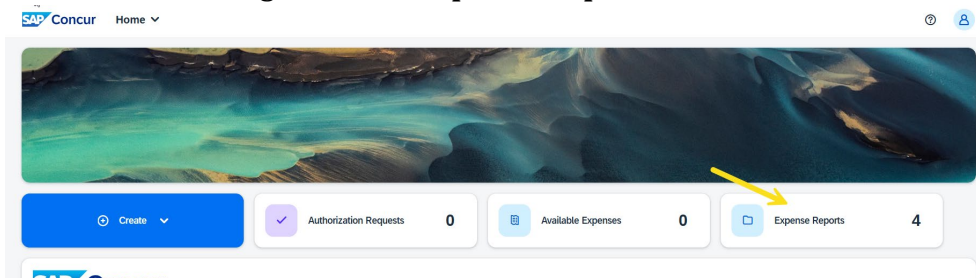
5. Once you are in the app, the screen will look like this:



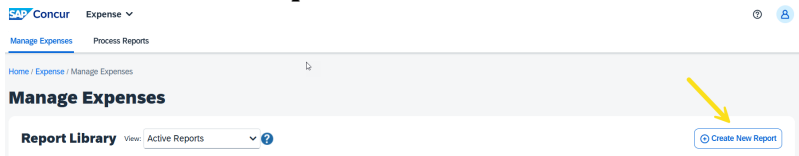
SECTION 2: DISTRICT CREDIT CARDS and REIMBURSEMENTS

2.1 Creating the Expense Report

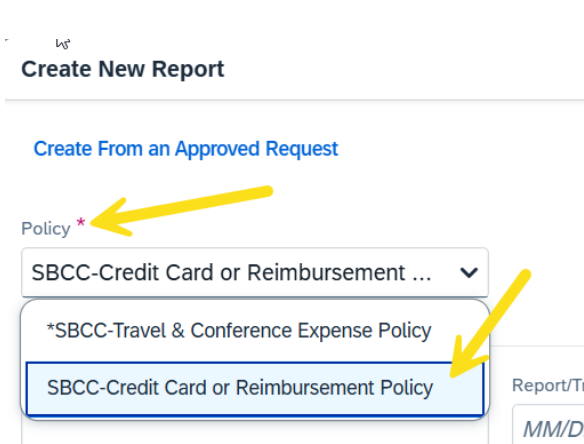
1. From the Home Page, click on **Expense Reports**.



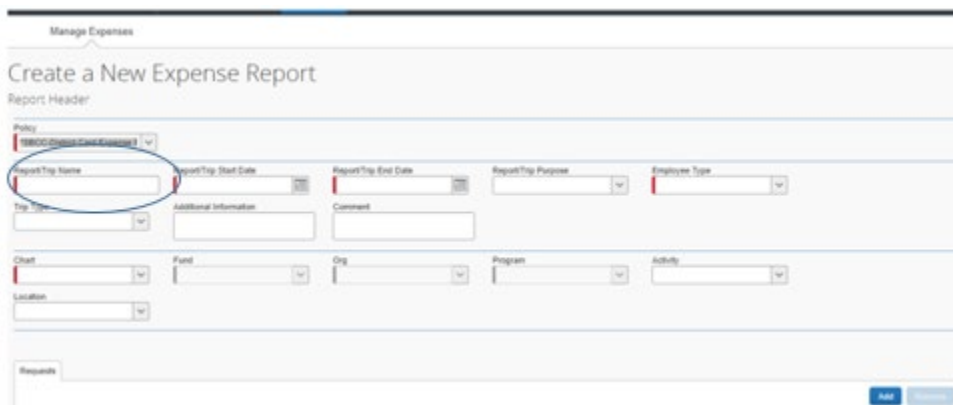
2. Click **Create New Report**.



3. Click on the **Policy** dropdown menu and then if you are working on a Credit Card or Reimbursement report click on **SBCC-Credit Card or Reimbursement Policy**. If you are working on a Travel and Conference report for **your own travel only** it will default to the correct policy.



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



5. 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: *SBOC-District Card Expense f

Report/Trip Name: August 2018 Credit Card

Report/Trip Start Date: [Date Picker]

Report/Trip End Date: [Date Picker]

Report/Trip Purpose: [Dropdown]

Employee Type: [Dropdown]

Trip Type: [Dropdown]

Additional Information: [Text Area]

Comments: [Text Area]

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="Refresh"/>					

- On the same screen, click on the **Employee Type** dropdown menu. If you are working on a credit card or reimbursement report, choose **Credit Card or Reimbursement**. If you are working on a Travel report, click on the appropriate reason.

Report/Trip Purpose *

None Selected

- None Selected
- Conference Attendee
- Conference Participant
- Credit Card or Reimbursement
- Development

- On the same screen, click on the **Employee Type** dropdown menu. If you are working on a credit card or reimbursement report, choose **Credit Card or Reimbursement**. If you are working on a travel report then click your employee type.

Employee Type *

None Selected

- None Selected
- Classified Management/Staff
- Credit Card or Reimbursement
- Faculty/Educational Administrator
- School of Extended Learning

8. **For travel reports only** Select your **Trip Type** and then answer **Does this trip includes personal travel?** If it includes personal travel state the number of personal days included.

Report Header

Sample Travel | \$3,334.00

Policy *
*SBCC-Travel & Conference Expense ...

Report/Trip Name * Sample Travel
Report/Trip Start Date * 12/15/2024
Report/Trip End Date * 12/20/2024
Report/Trip Purpose * Conference Attendee

Employee Type * Classified Management/Staff
Trip Type * In-State
Does this trip include personal travel? * No
Number of personal days

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

Chart

1 | Fund 2

Type to search by:
 Text Code
 (Code) Text

(1) SBCC Chart

Requests

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

Fund

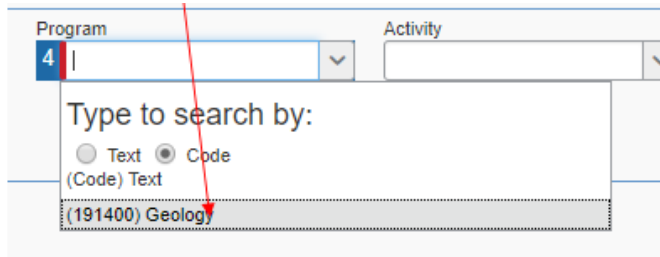
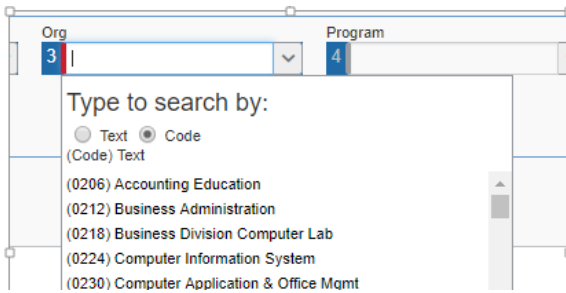
2 | Org 3

Type to search by:
 Text Code
 (Code) Text

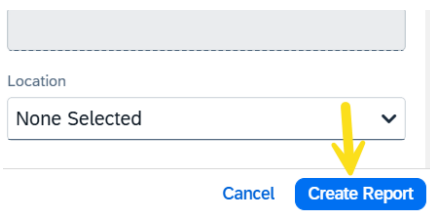
(11000) General Fund - Unrestricted
 (12002) ESTEEM Enhance Success in Transfer
 (12003) Veteran Resource Center
 (12005) Title V iPath To Success Year 3
 (12007) Scheinfeld Program
 (12010) Adult Basic ED ESL Grant
 (12011) IEPI-Institutional Effectiveness
 (12013) Guided Pathways
 (12014) Faculty Inquiry Network (FIN)
 (12015) Wellness Program_SB County CN19313

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

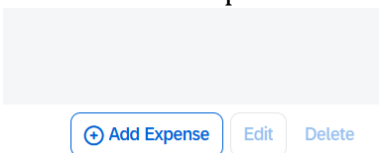
NOTE: Activity and Location are only used in certain situations. If you need one or both, choose your Activity and/or Location the same way you choose your Fund, Org, and Program.



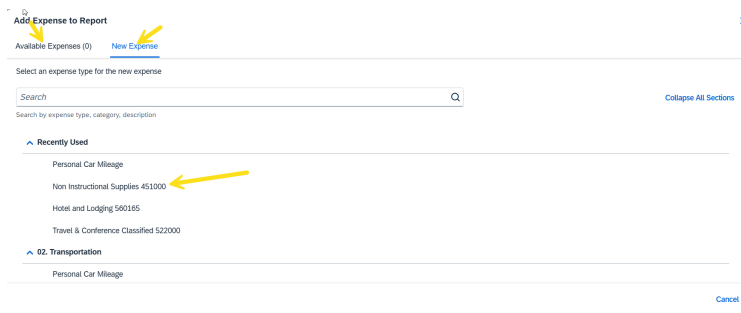
12. When done, click **CREATE REPORT**.



13. Click the Add Expense button



14. The **Add expense to Report** screen will appear. Click on **Available Expenses** to add your credit card charges or **New Expense** to add items you paid for out of pocket. For a **New Expense** click on the category, also called the Expense Type. (Credit card charges will do this later.) For a credit card charge, click the box by the charge or charges you want to add and click **Add to Report**



Available Expenses (1) New Expense

<input checked="" type="checkbox"/>	Payment Type↑↓	Expense Source	Expense Type↑↓	Vendor Details↑↓	Date↓↑	Amount↓↑
<input checked="" type="checkbox"/>	Out of Pocket	Expense	Lunch	TRADER JOES Goleta, California		\$54.00

[Add To Report](#)

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

Expenses View: Standard

[Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move](#)

<input type="checkbox"/>	Alerts↑↓	Receipt↑↓	Payment Type↑↓	Expense Type↑↓	Vendor Details↑↓	Date↓↑	Requested↓↑
<input type="checkbox"/>			Out of Pocket	Non Instructional Supplies 451000	test Santa Barbara, California	01/30/2025	\$1.00
							\$1.00

- Click on the first expense on the left side. Next, click on the **Expense Type** dropdown list if this is a credit card charge, it will already be populated if it is out of pocket. Check that both your **Employee Type and Report/Trip Purpose** are Credit Card or Reimbursement. Add your **Transaction Date** if it does not populate. Add your **Vendor Name** if it does not populate. Add the **City of Purchase** if it does not populate. Check to make sure your **Payment Type** is correct. Add your **Amount** if it does not populate. Add any **Comments** that are needed to explain the purchase you made.

NOTE FOR TRAVEL REPORTS: The expense type hotel will require you to do an itemization. Please review the Itemization section for this.

The image shows a screenshot of an expense entry form with two main sections: 'Details' and 'Receipt'.

Details Section:

- Expense Type ***: Non Instructional Supplies 451000
- Employee Type ***: Credit Card or Reimbursement
- Report/Trip Purpose ***: Credit Card or Reimbursement
- Enter Vendor Name**: (Empty field)
- Transaction Date ***: MM/DD/YYYY
- Additional Information**: (Empty field)
- City of Purchase**: (Empty dropdown)
- Payment Type ***: Out of Pocket
- Amount ***: (Empty field)
- Currency ***: US, Dollar (USD)
- Comment**: (Empty text area, 0/500 characters)

Receipt Section:

Click to upload or drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. SMB limit please.

Buttons: Save Expense, Save and Add Another, Cancel, Add Receipt

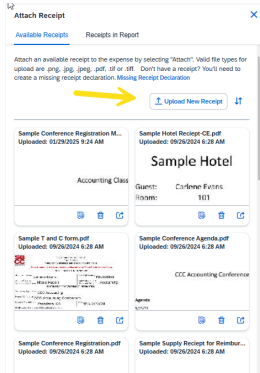
2.2 Attaching the Receipts

- Then click on **Attach Receipt**.

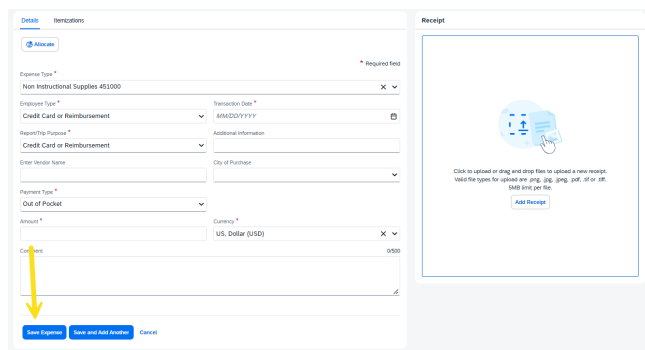
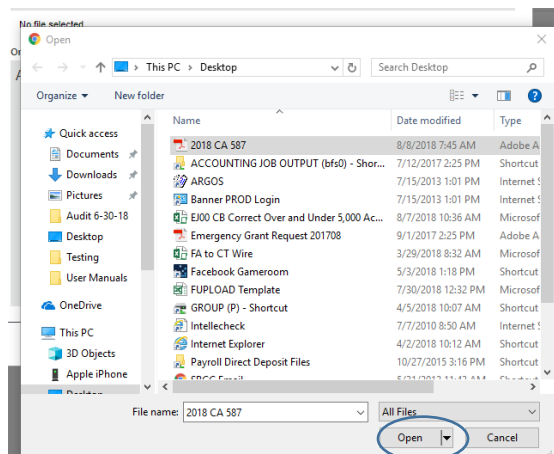
This is a smaller version of the expense entry form shown above. The 'Attach Receipt' button in the 'Receipt' section is highlighted with a yellow arrow, indicating the next step in the process.

- The box pictured below will pop up. Click on **Upload New Receipt** to upload and attach a receipt from your computer/device.

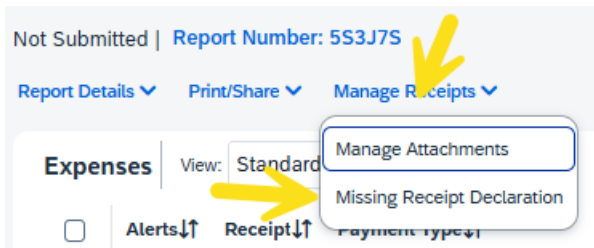
NOTE: If you have already saved the receipt in the Concur app without assigning to an expense, you can **Attach** the receipt from the Available Receipts area.



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. This will attach the receipt to the line item in your report. Then click **Save Expense**.



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 **Manage Receipts** and then **Missing Receipt Declaration**.



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

Missing Receipt Affidavit ×

Adequate documentation must be submitted to substantiate reimbursable University expenses in accordance with IRS rules & regulations. Original receipts must be submitted when available and are considered acceptable support for Santa Barbara Community College's expenses. When the original receipt has been lost or is otherwise not available from the vendor, the following documentary evidence must be submitted before expenses will be considered for reimbursement.

To create an affidavit, choose from the Expense(s) below that require a Receipt

<input type="checkbox"/>	Expense Type	Date ▲	Amount
<input type="checkbox"/>	Field Trips SIERRA SUNDANCE WHOLE FOO, Mammoth Lal	08/04/2018	\$79.14
<input type="checkbox"/>	Undefined SQ *MAMMOTH MOUNTAI, Mammoth Lakes, Cali	08/04/2018	\$32.00
<input type="checkbox"/>	Undefined SQ *MAMMOTH MOUNTAI, Mammoth Lakes, Cali	08/04/2018	\$119.68
<input type="checkbox"/>	Undefined DIY HOME CENTER #01 MA, Mammoth Lakes, Ci	08/04/2018	\$32.73
<input type="checkbox"/>	Undefined SQ *EASTERN SIERRA	08/04/2018	\$27.96
<input type="checkbox"/>	Undefined EXXONMOBIL 96899851	08/04/2018	\$5.92

- 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, Ci	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.

Accept & Create
Cancel

- 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.



- 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.
- FOR TRAVEL REPORTS ONLY:** Add the following Expense Types using the Payment Type “Out of Pocket” and Amount \$0.00:

Approved Travel and Conference Form
Conference Agenda

Use your Approved Travel and Conference Form and your conference agenda as the receipt for each corresponding Expense Type

sample T&C \$15.00 Submit Report Copy Report Delete Report

Not Submitted | Report Number: RF64LF

Report Details Print/Share Manage Receipts View Available Receipts

Expenses View: Standard Add Expense Edit Delete Copy Allocate Combine Expenses Move

Comment	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
		Out of Pocket	Dinner	test	08/03/2025	\$15.00
		Out of Pocket	Conference Agenda		08/03/2025	\$0.00
		Out of Pocket	Approved Travel & Conference Form		08/03/2025	\$0.00
						\$15.00

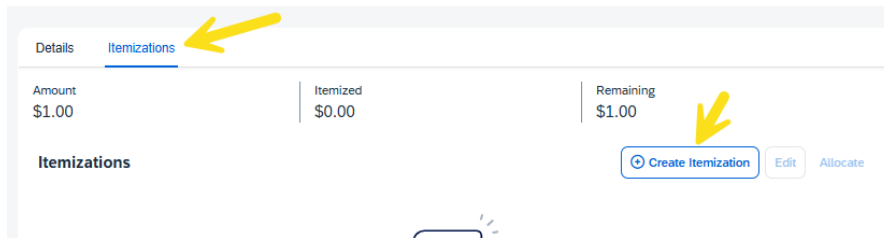
Annotations in the screenshot:
 - A yellow box labeled "Use 'Out of Pocket'" has arrows pointing to the Payment Type column for the three rows.
 - A blue box labeled "Expense Types" has arrows pointing to the Expense Type column for the two rows in the red-bordered section.
 - A yellow box labeled "Amount should be \$0.00" has arrows pointing to the Requested column for the two rows in the red-bordered section.

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

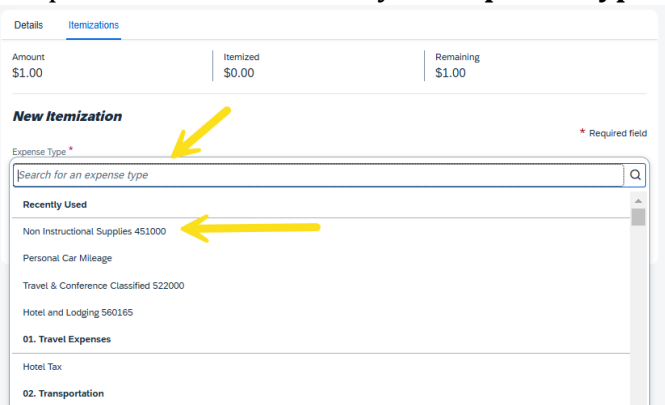
Concur gives you the ability to itemize (split) expenses (e.g. adding a tip amount that was paid via cash) via the **Itemize** feature. **Please note Itemization of Hotel is different, if you need to do this please go to step 5.**

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.

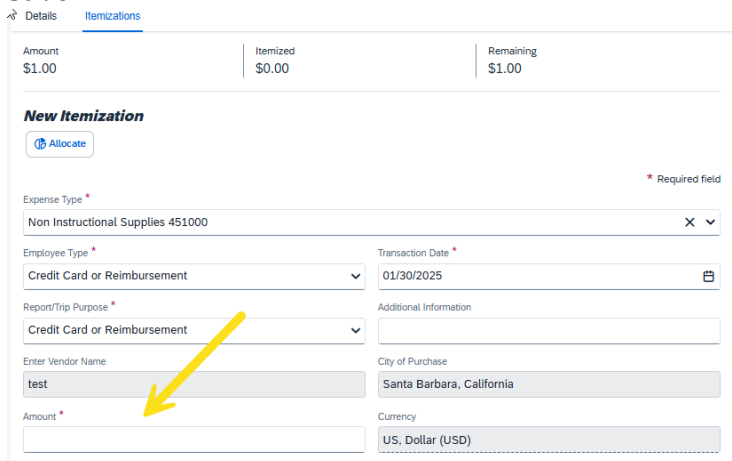
- Open the expense. Then click on **Itemizations**. And then click on **Create Itemization**



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



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



4. Repeat until all the expense types are done and the subtotal adds up to the whole expense amount. If there is any amount in Remaining then you are not done or your amounts need correcting. Then click **Save**. Your screen will now include the itemized amounts and update totals accordingly.

← → **Non Instructional Supplies 451000 \$1.00**

01/30/2025 | test

Details **Itemizations**

Amount \$1.00 | Itemized \$0.50 | Remaining \$0.50

Itemizations

Date	Expense Type	Requested
01/30/2025	Non Instructional Supplies 451000	\$0.50

Out of Pocket | Non Instructional Supplies 451000 | test Santa Barbara, California | 01/30/2025 | \$1.00 Itemized

5. **Itemization of Hotel** Make sure your Date Range is set correctly.

Details **Itemizations**

* Required field

Expense Type *
Hotel

Employee Type *
Classified Management/Staff

Date Range *
12/15/2024 - 12/20/2024

Nights:
5

Click **Itemizations**. Then click on Expense Type **Hotel**. Then select your **Recurrence** Same daily amount or Different daily amount. If it is the same just fill in the first line of rates and taxes. If you only have room charges on your hotel bill, click **Save Itemizations**. If you have parking or meals on your hotel bill you will need to **Save and Add Another**. Then add your additional items.

Details **Itemizations**

Amount \$1,800.00 | Itemized \$0.00 | Remaining \$1,800.00

New Itemization

Expense Type *
Hotel

Recurrence *
Same daily amount

Nights: 5

Date	Room Rate*	Room Tax	Tax 2	Tax 3
12/15/2024				
12/16/2024				
12/17/2024				
12/18/2024				
12/19/2024				

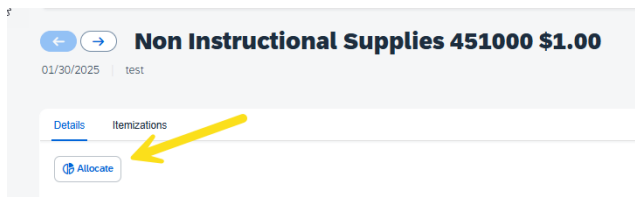
(Amounts in US\$) | Add Tax Fields

Save Itemization | Save and Add Another | Cancel

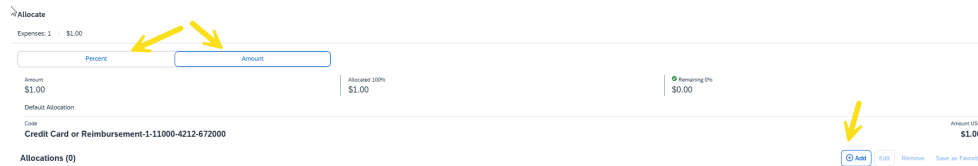
2.4 Allocating Expenses to Different Funds, Orgs, Programs, and/or Activities

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:

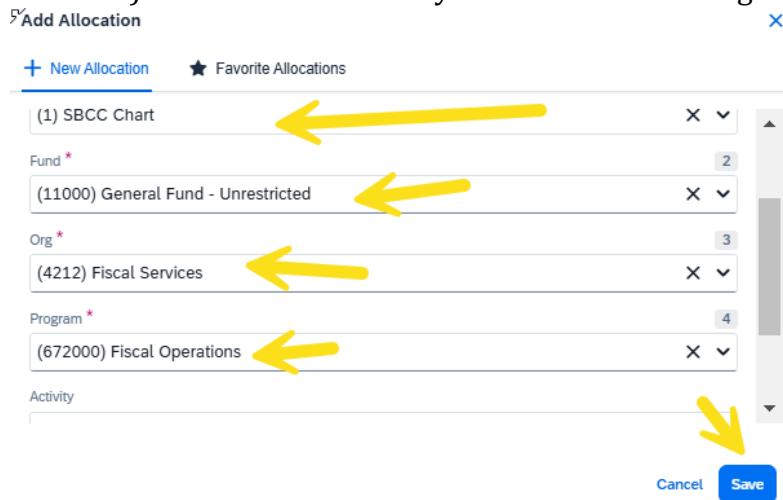
1. First open the expense. Then click on **Allocate**.



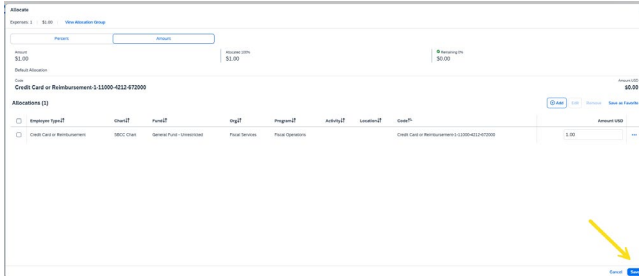
2. The Allocation screen will open up. Click on either **Percent** or **Amount** and then click **Add**



3. Complete each separate line for each Chart/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.

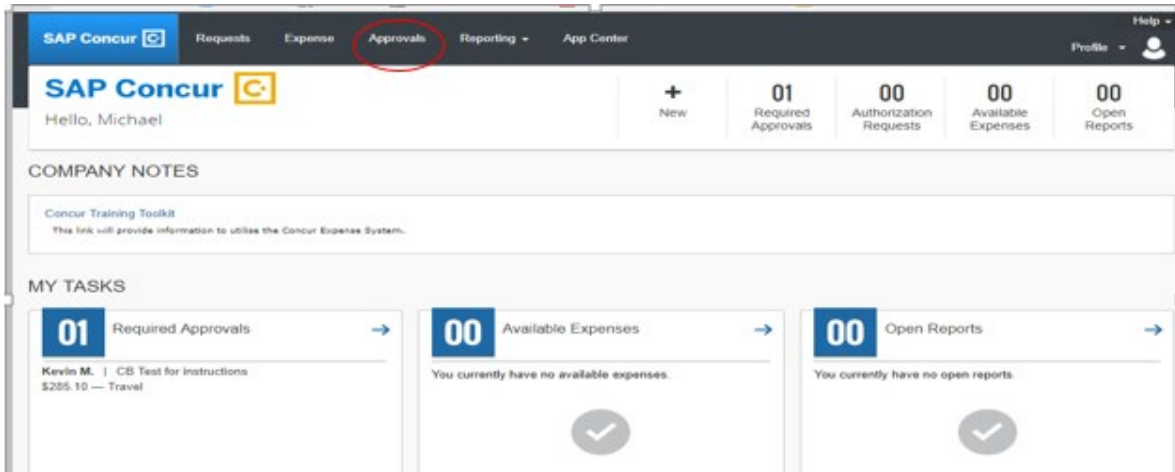


6. This will close the popup screen. When you are done allocating, click **Save**.

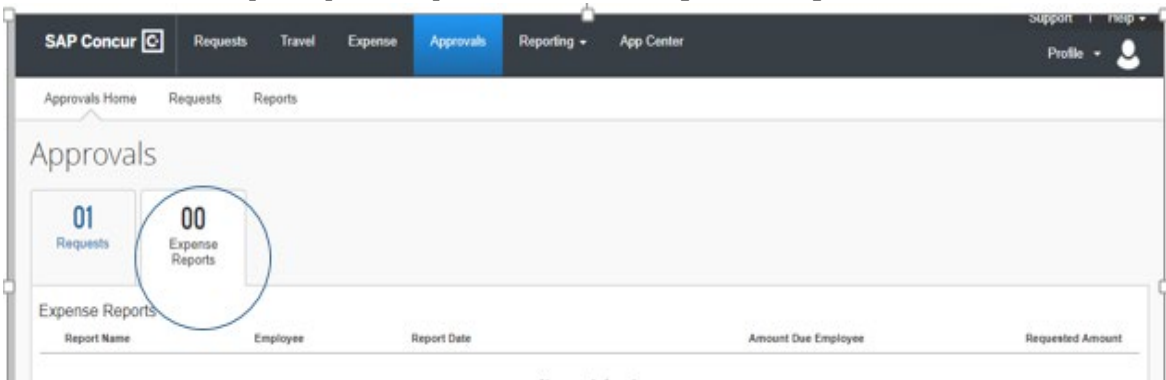


2.5 Approving an Expense Report

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



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



2. Click on a report to review.

Approvals

00 Requests 01 Expense Reports

Expense Reports

Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
Test Request	Test, Traveler2	08/09/2018	\$536.00	\$536.00

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

Approvals Home Requests Reports

Test Request [Test, Traveler2]

Summary **Details** Receipts Print / Email Hide Exceptions

Send Back to User Approve

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

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	Dinner			Anaheim, Calif...	Out of Pocket	\$36.00	\$36.00

Summary

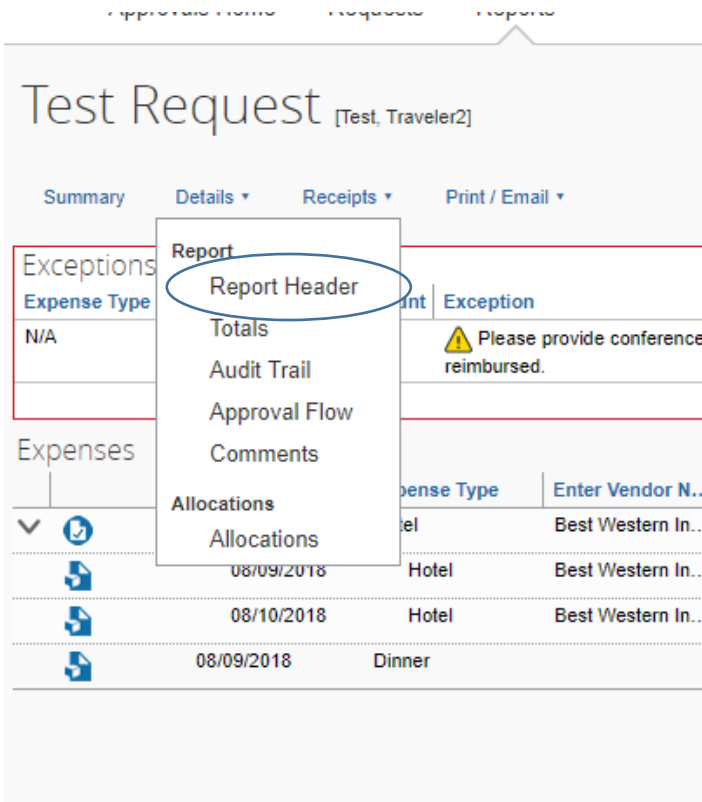
Report Summary

Report Totals	Amount Due Company	Amount Due Employee
	\$0.00	\$536.00

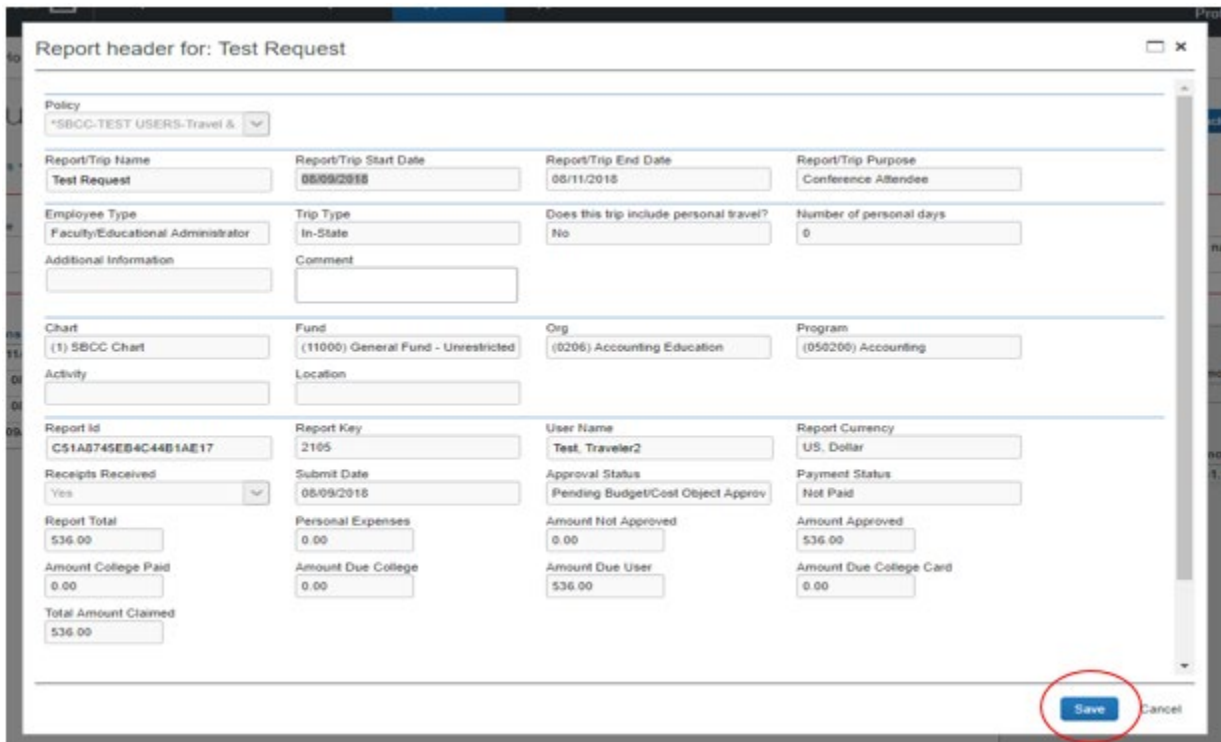
Requests (1)

Request...	Request...	Amount ...	Amount ...
>	Test Req ...	3349	\$1,101.00 \$565.00

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



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



6. 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/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

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

COST OBJECT APPROVED AMOUNT **\$536.00**

Expense Receipt Image Summary

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

Expense Type: Hotel

Employee Type: Faculty/Educational Administrator

Transaction Date: 08/11/2018

Report/Trip Purpose: Conference Attendee

Additional Information:

Vendor: Best Western International

City of Purchase: Anaheim, California

Payment Type: Out of Pocket

Amount: \$500.00

Save Attach Receipt

7. 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.

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, 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

COST OBJECT APPROVED AMOUNT **\$536.00**

Expense Receipt Image Summary

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

Conference agenda 02/20/2018

8. 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, Travel(2))

Summary Details Receipts Print / Email Hide Exceptions

Send Back to User Approve

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

Transaction Date	Expense Type	Enter Vendor N...	*Additional Inf...	City of Purchase	Payment Type	Amount	Adjusted Claim...
05/11/2018	Hotel	Best Western In...		Anaheim, Calif...	Out of Pocket	\$500.00	\$500.00
05/09/2018	Hotel	Best Western In...		Anaheim, Calif...	Out of Pocket	\$250.00	\$250.00
05/10/2018	Hotel	Best Western In...		Anaheim, Calif...	Out of Pocket	\$250.00	\$250.00
05/09/2018	Dinner			Anaheim, Calif...	Out of Pocket	\$36.00	\$36.00

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

Expense Type: Hotel

Employee Type: Faculty/Educational Administrator

Transaction Date: 05/10/2018

Report/Trip Purpose: Conference Attendee

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

Send Back Report

Comment History

Date	Entered By	Comment Text
Add a comment to explain why you are returning the report. Then click OK to return the report to the employee.		
<input type="text" value="Comment"/>		

OK Cancel

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

The screenshot shows a 'Test Request' form for a traveler. At the top right, there are two buttons: 'Send Back to User' and 'Approve'. The 'Approve' button is circled in red. Below the buttons is a navigation menu with 'Summary', 'Details', 'Receipts', and 'Print / Email'. An 'Exceptions' window is open, showing a warning message: '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.' Below this is a table of 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
08/19/2018	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

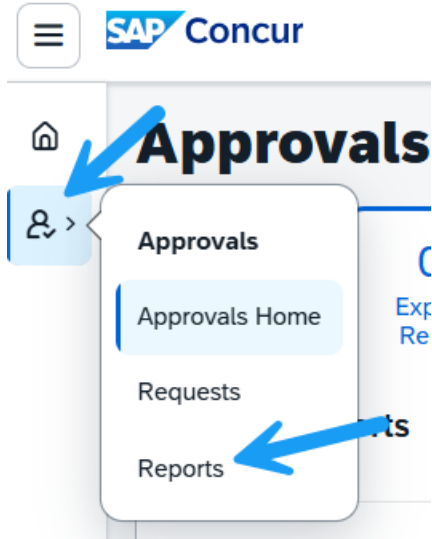
On the right side, there is a summary section with fields for Expense Type (Hotel), Employee Type (Faculty/Educational Administrator), Transaction Date (08/10/2018), Report/Trip Purpose (Conference Attendee), and Vendor (Best Western International). A total amount summary shows: Total Amount: 5500.00 | Itemized: 5500.00 | Remaining: 0.

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

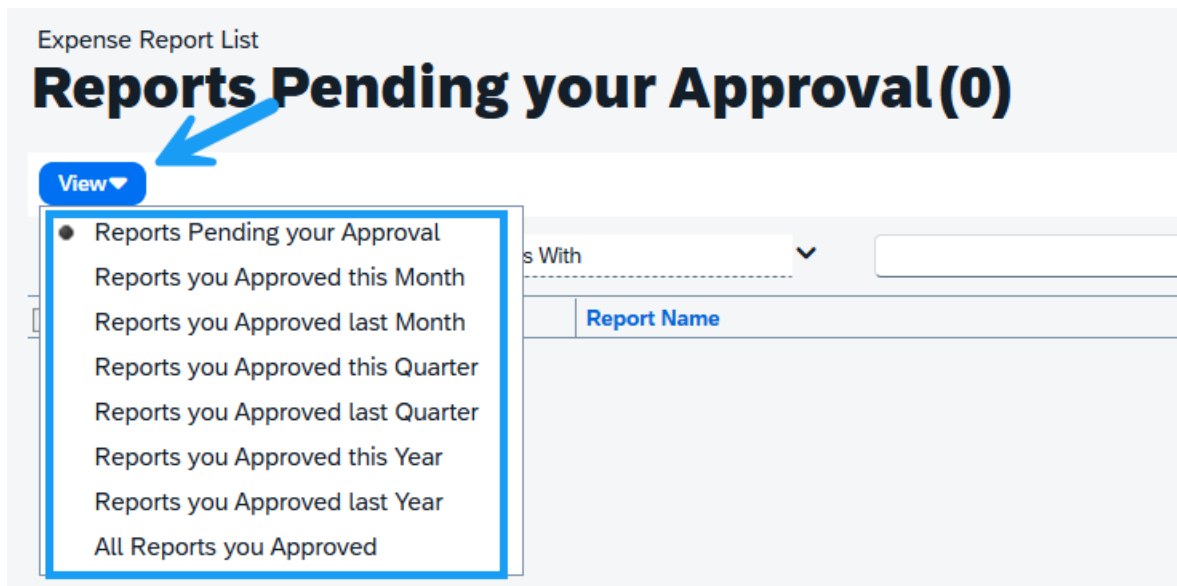
The screenshot shows a 'Final Confirmation' dialog box. The title is 'Final Confirmation'. The main text reads: 'Approver Electronic Agreement' followed by 'By clicking 'Accept' I certify that the expense report and its accompanying receipts have been reviewed and are in compliance with College policy.' At the bottom right of the dialog, there are two buttons: 'Accept' and 'Decline'. The 'Accept' button is circled in red.

2.6 Reviewing Expense Reports that you have Approved

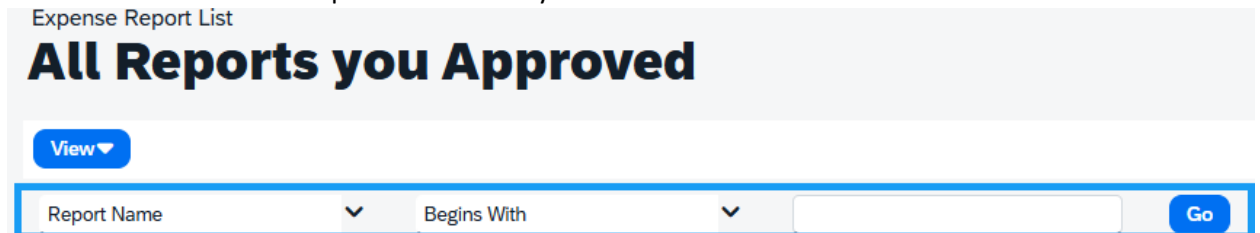
1. On the left side of the screen click on the Approvals Avatar.



2. Then click on Reports



3. Click on View and select the time period you want to look at.
4. You can use the selection options to narrow your search.



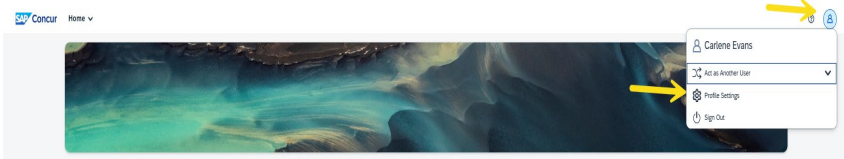
SECTION 3: DELEGATING

3.1 Setting up a Delegate

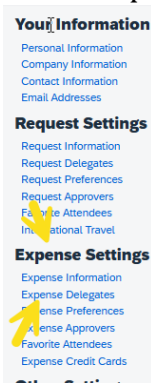
A **delegate** is someone who can create expense reports and travel requests on your behalf based on the permissions you give them.

To set up a delegate:

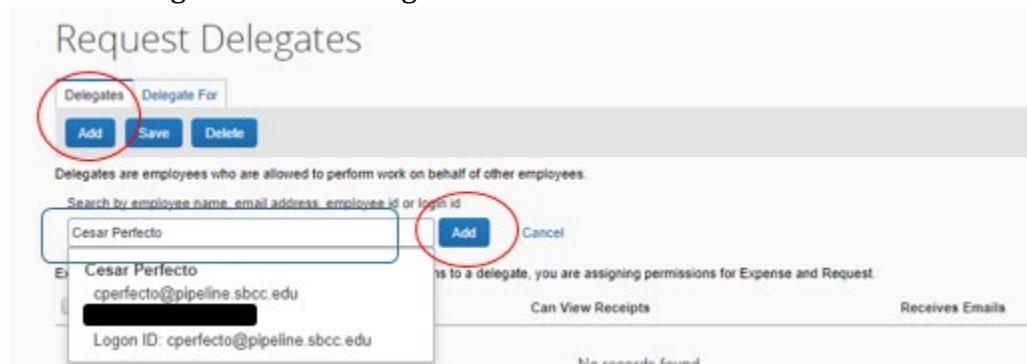
1. From the Welcome Screen click on the **Avatar** and choose **Profile Settings**.



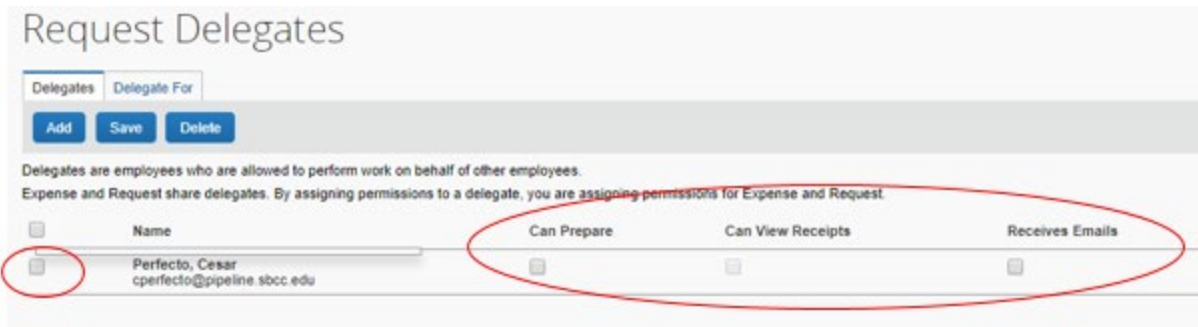
2. Under Expense Settings in the left part of the screen, click on **Expense Delegates**.



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.



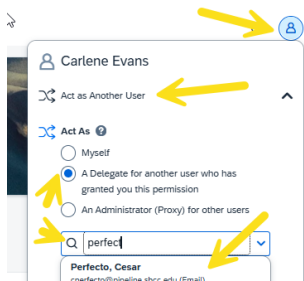
4. To assign permissions to the Delegate, check the box by the person's name and then assign permissions accordingly by clicking on the appropriate permission checkboxes and then click **Save**.



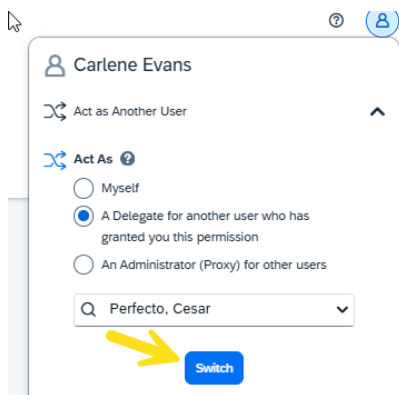
3.2 Acting As a Delegate

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 the **Avatar** and then Click on **Act as Another User**. Click on **A Delegate for another user who has granted you this permission**. Then search for the person you want to act as Delegate for and click on them in the dropdown

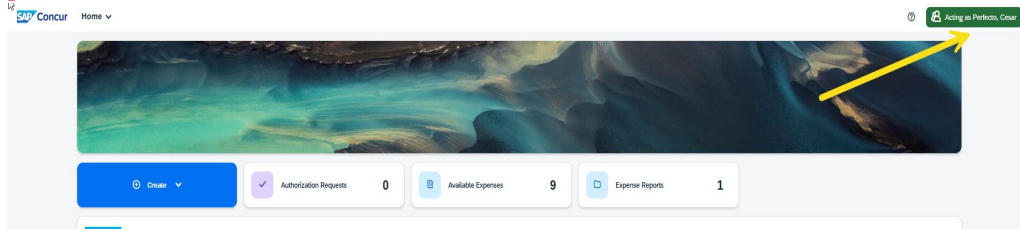


2. If the person you are going to act as a Delegate for is not on the list, start typing their name in. Then click **Switch**.

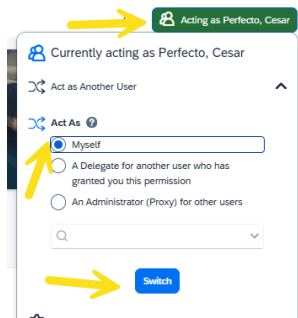


- You will then go to a new user screen. Note the name below “SAP Concur” and the green box show who you are acting as. If your own name is showing, then you are working on your reports (not theirs).

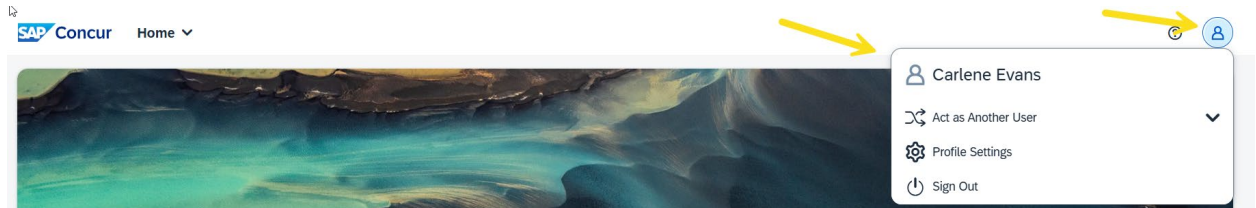
Special Note: you can only as a Delegate if someone has assigned you Delegate permissions.



- When done acting as a delegate, click the green box in the upper right of the screen. Then click on **Myself** and then **Switch**.

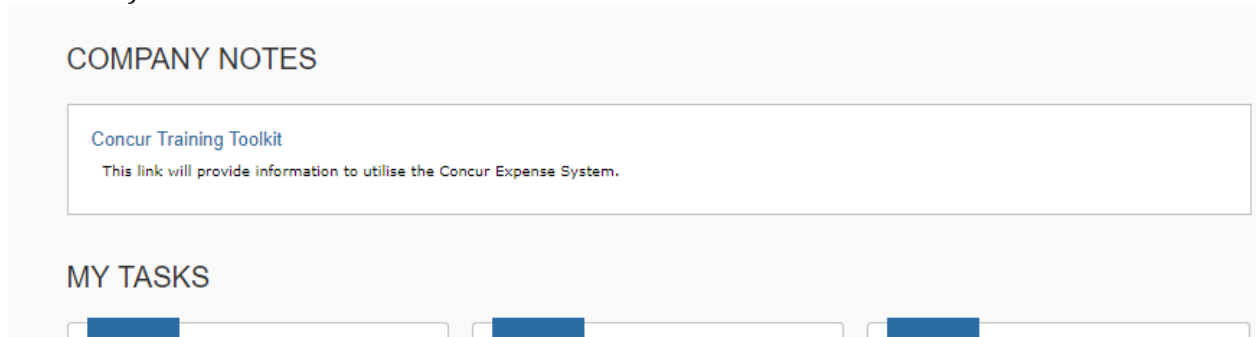


- You will then return to your account. Click on the **Avatar** and check that your name shows.



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 on the SBCC Fiscal Services website (<http://www.sbcc.edu/fiscalservices/>).