

Concur Reference Guide

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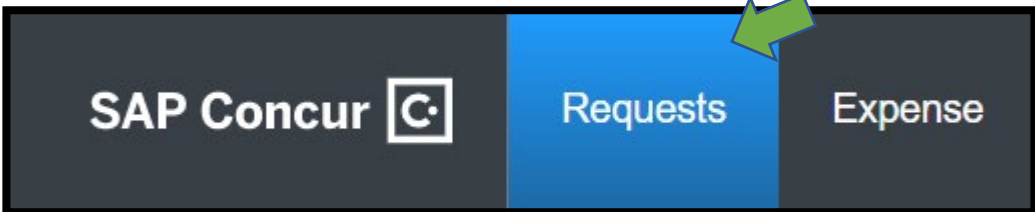
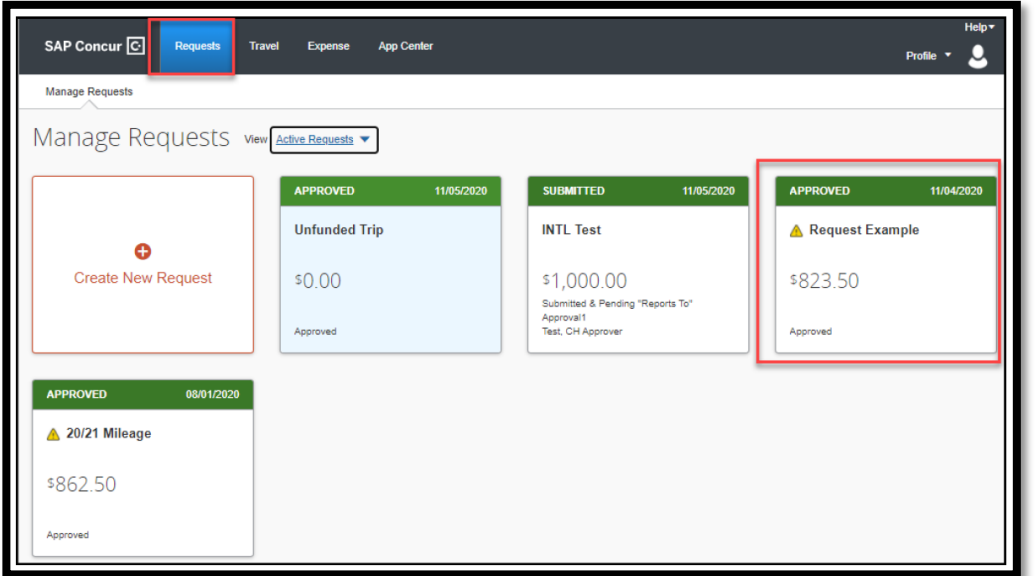
[11.0 Printing an Expense Report](#)

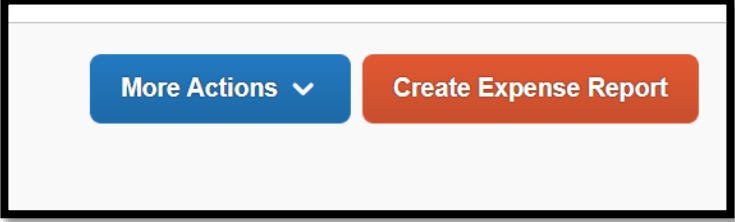
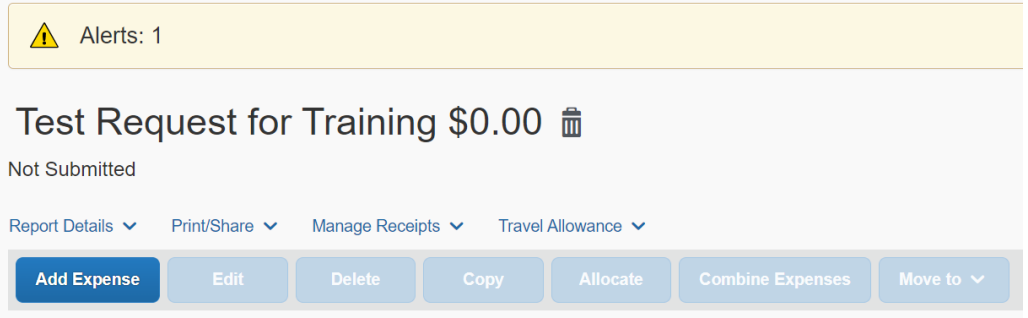
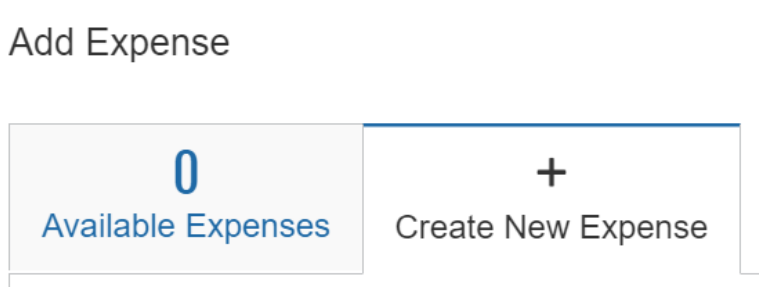
1.0 Creating an Expense Report in Concur

All CSU related travel for faculty and staff must have an approved Travel Request before an expense report can be created.

Per CSU Travel Procedures, Reporting Period ***"Travel Expense Claim must be submitted to the campus Travel Reimbursement office within 60 days of the end of a trip unless there is recurrent local travel, in which case claims may be aggregated and submitted monthly. Claims submitted after the 60-day window are left to the discretion of the campus, considering the facts and circumstances, whether the reimbursement will be made and if any reporting as taxable income will be required."***

Please be aware Approved Travel Requests will automatically close on day 61 after the travel end date. In order to submit a late expense report, the request will have to be re-opened. The request will not be re-opened until a travel exception request has been approved.

Processing Steps	Screenshot
<p>Log into concur > click on requests</p>	
<p>Click Request on the header toolbar, and then select the tile for the specific trip request.</p>	

Processing Steps	
<p>Click on Create Expense Report (This will link the request to the appropriate report)</p>	 <p>A screenshot showing two buttons: a blue button labeled 'More Actions' with a downward arrow, and an orange button labeled 'Create Expense Report'.</p>
<p>Click on the Add Expense Tab</p>	 <p>A screenshot of an expense report interface. At the top, there is a yellow alert bar with a warning icon and the text 'Alerts: 1'. Below this, the title is 'Test Request for Training \$0.00' with a trash icon. Underneath, it says 'Not Submitted'. There are four dropdown menus: 'Report Details', 'Print/Share', 'Manage Receipts', and 'Travel Allowance'. At the bottom, there is a row of buttons: 'Add Expense' (blue), 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to' with a dropdown arrow.</p>
<p>Available Expenses will appear when you have used your University Liability Travel Card or booked Air/Rail through concur.</p>	 <p>A screenshot of the 'Add Expense' section. It features a large blue '0' above the text 'Available Expenses'. To the right, there is a blue plus sign above the text 'Create New Expense'.</p>

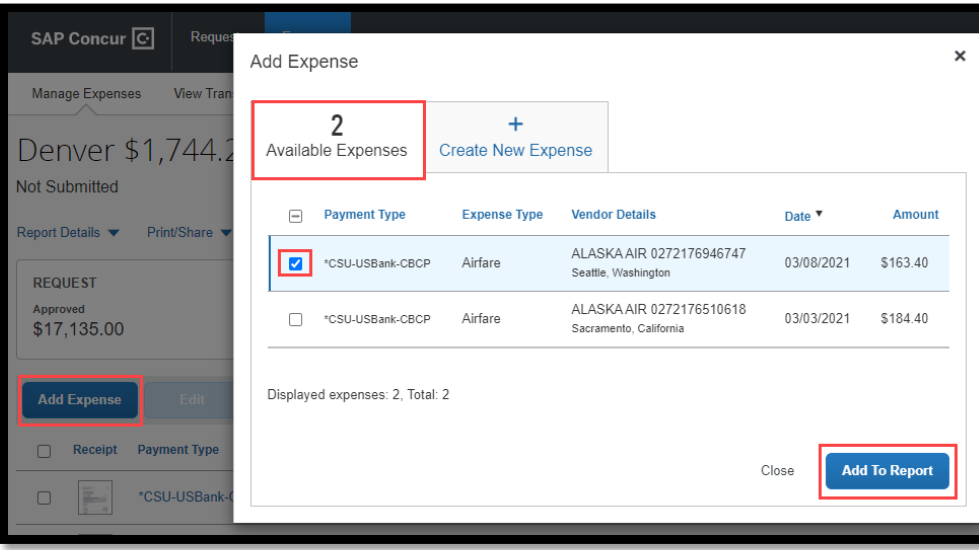

2.0 Adding Expenses to the Report

There are various ways to add expenses and compile a complete expense report. Overall, the goal is to reflect all costs associated with a trip, regardless of payment method.

2.1 Travel Credit Card/Ghost Card Charges

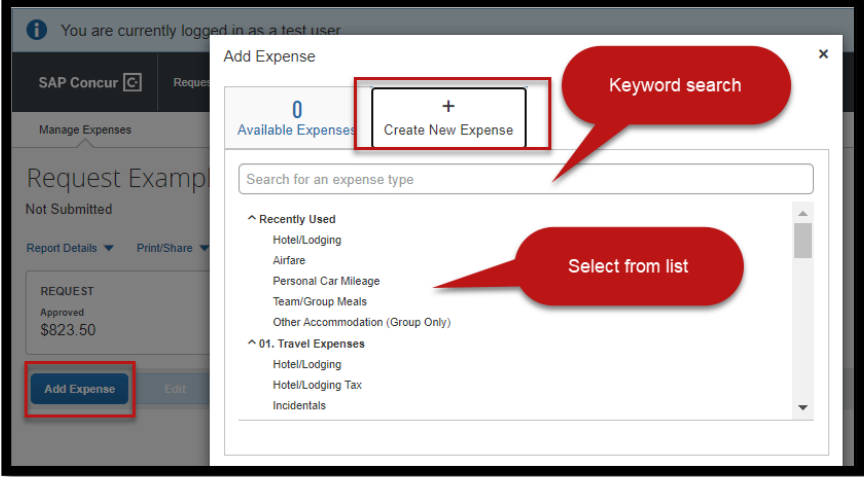
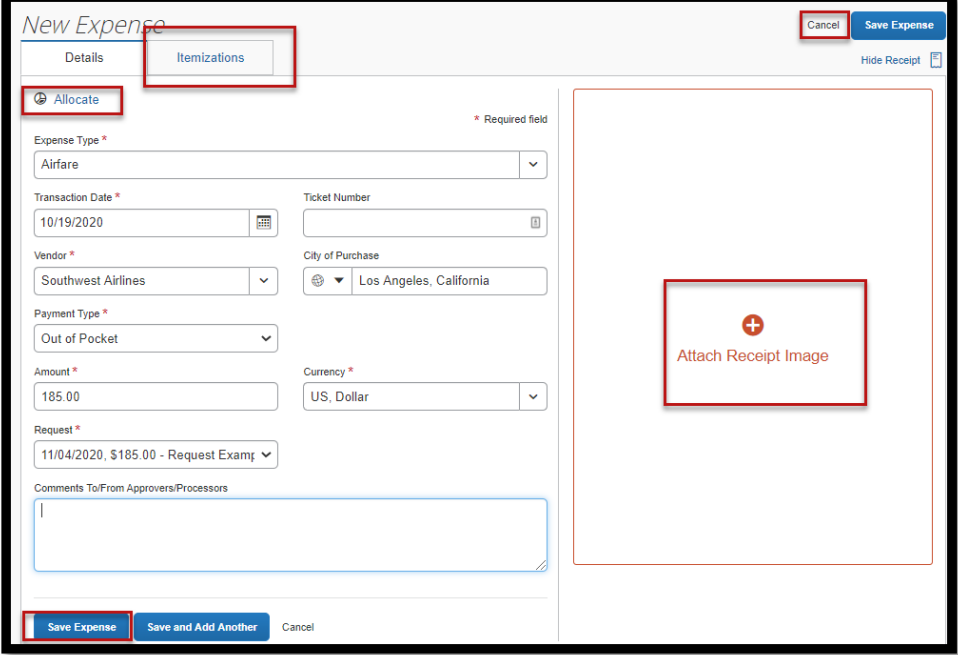
You can add Concur Travel card transactions to an expense report in these ways:

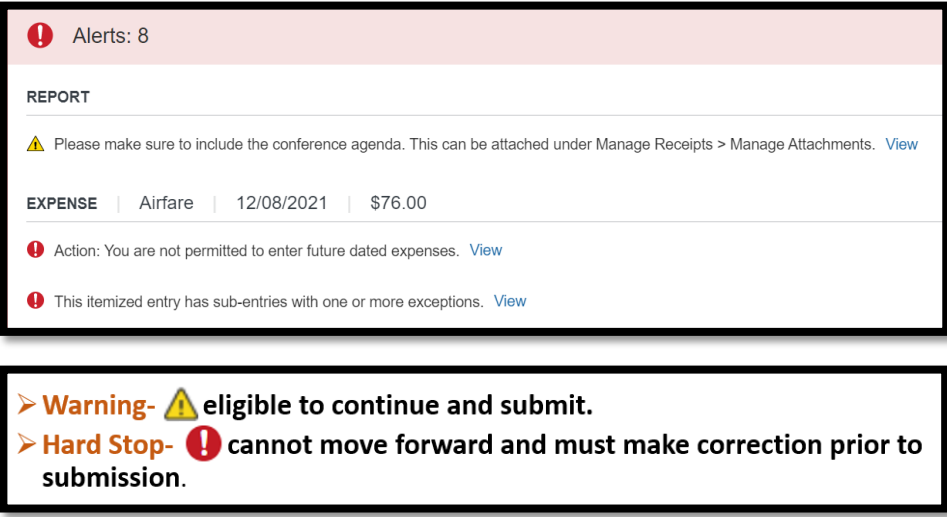
- From the open expense report (**Add Available Expenses**)
- From the **Available Expenses** section (**Expense > Manage Expenses**)

Processing Steps	Screenshot															
<p>From the open expense report, click Add Expense.</p> <p>Select related expenses and then Add to Report button.</p> <p>Verify or update the Expense Type classification of the imported credit card transactions or any other required fields that need to be populated.</p>	 <p>The screenshot shows the 'Add Expense' dialog box in SAP Concur. At the top, it displays '2 Available Expenses' and a '+ Create New Expense' button. Below this is a table with columns: Payment Type, Expense Type, Vendor Details, Date, and Amount. Two entries are listed, both for '*CSU-USBank-CBCP' Airfare. The first entry is selected with a checked checkbox. The second entry is not selected. At the bottom right, there is a 'Close' button and a highlighted 'Add To Report' button.</p> <table border="1"> <thead> <tr> <th>Payment Type</th> <th>Expense Type</th> <th>Vendor Details</th> <th>Date</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>*CSU-USBank-CBCP</td> <td>Airfare ALASKA AIR 0272176946747 Seattle, Washington</td> <td>03/08/2021</td> <td>\$163.40</td> </tr> <tr> <td><input type="checkbox"/></td> <td>*CSU-USBank-CBCP</td> <td>Airfare ALASKA AIR 0272176510618 Sacramento, California</td> <td>03/03/2021</td> <td>\$184.40</td> </tr> </tbody> </table>	Payment Type	Expense Type	Vendor Details	Date	Amount	<input checked="" type="checkbox"/>	*CSU-USBank-CBCP	Airfare ALASKA AIR 0272176946747 Seattle, Washington	03/08/2021	\$163.40	<input type="checkbox"/>	*CSU-USBank-CBCP	Airfare ALASKA AIR 0272176510618 Sacramento, California	03/03/2021	\$184.40
Payment Type	Expense Type	Vendor Details	Date	Amount												
<input checked="" type="checkbox"/>	*CSU-USBank-CBCP	Airfare ALASKA AIR 0272176946747 Seattle, Washington	03/08/2021	\$163.40												
<input type="checkbox"/>	*CSU-USBank-CBCP	Airfare ALASKA AIR 0272176510618 Sacramento, California	03/03/2021	\$184.40												
<p>From the Available Expenses section select each transaction that you want to assign to the current expense report.</p> <ol style="list-style-type: none"> Click Move and select the related expense report. Verify or update the Expense Type classification of the imported credit card transaction. 	 <p>The screenshot shows the 'AVAILABLE EXPENSES' section. At the top, there is a dropdown for 'All Cards'. Below is a table with columns: Expense Detail, Expense Type, Source, Date, and Amount. One entry is selected with a checked checkbox. A red callout points to a credit card icon in the Source column. At the bottom right, there is a 'To New Report' button highlighted with a red box.</p> <table border="1"> <thead> <tr> <th>Expense Detail</th> <th>Expense Type</th> <th>Source</th> <th>Date</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Courtyards SUNNYVALE, CA</td> <td>Other Expense</td> <td></td> <td></td> </tr> </tbody> </table>	Expense Detail	Expense Type	Source	Date	Amount	<input checked="" type="checkbox"/>	Courtyards SUNNYVALE, CA	Other Expense							
Expense Detail	Expense Type	Source	Date	Amount												
<input checked="" type="checkbox"/>	Courtyards SUNNYVALE, CA	Other Expense														

2.2 Out-of-Pocket Expense

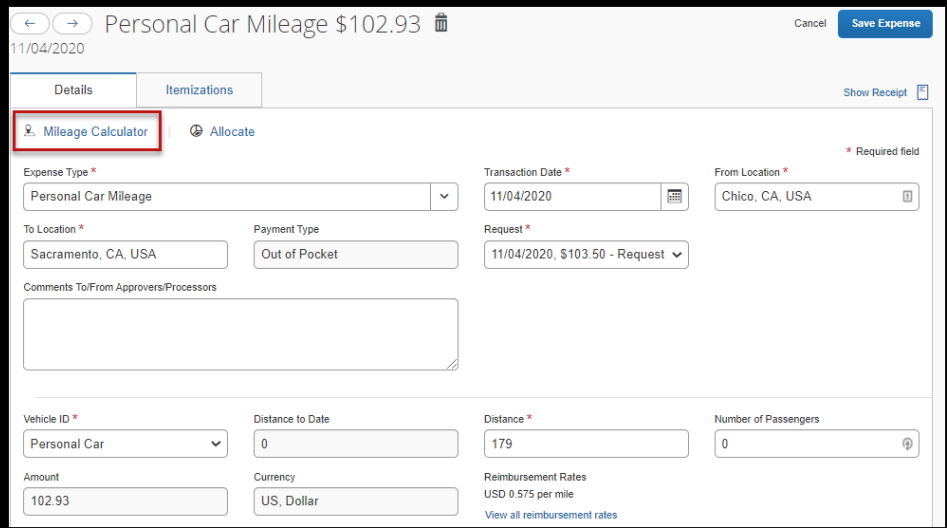
To add an out-of-pocket expense to an Expense Report:

Processing Steps	Screenshot
<p>From the open report, click Add Expense.</p>	
<p>On the New Expense tab, click the appropriate expense type. Each expense type will have their own set of required fields and configuration.</p> <p>Complete the required fields. Click one of the following:</p> <ul style="list-style-type: none"> • Save Expense • Itemizations - to itemize the expense and classify as two different expense types (i.e. dinner and parking). <i>NOTE: Hotel expenses require itemization to break down nightly rates, taxes, etc.</i> • Allocate - to allocate the expense between various chartfields as applicable • Attach Receipts - to upload and attach receipt images • Cancel - to exit without saving this expense 	

Processing Steps	Screenshot
<p>CSU and campus specific audit rules are integrated into the system.</p> <p>When adding an expense that requires a certain action an alert message will appear.</p>	 <p>The screenshot shows an 'Alerts: 8' notification bar at the top. Below it is a 'REPORT' section with a warning icon and text: 'Please make sure to include the conference agenda. This can be attached under Manage Receipts > Manage Attachments. View'. Underneath is an 'EXPENSE' summary for 'Airfare' on '12/08/2021' for '\$76.00'. Two red alert icons are present: 'Action: You are not permitted to enter future dated expenses. View' and 'This itemized entry has sub-entries with one or more exceptions. View'. At the bottom, a large warning box states: 'Warning- ⚠️ eligible to continue and submit. Hard Stop- 🛑 cannot move forward and must make correction prior to submission.'</p>

2.3 Personal Car Mileage

You must register a car for the applicable mileage type to be reimbursed for mileage. For instructions on setting up your vehicle(s), see the Concur [Personal Car Info Guide](#).

Processing Steps	Screenshot
<p>With the Expense Report open, on the New Expense tab, select the Personal Car Mileage Expense Type.</p> <p>The mileage form will open with the required and optional fields displayed including the Mileage Calculator link.</p> <p>Complete all fields as appropriate. <i>Enter business purpose in the comment field.</i></p>	 <p>The screenshot shows the 'Personal Car Mileage \$102.93' form. The 'Expense Type' is set to 'Personal Car Mileage'. The 'Transaction Date' is '11/04/2020' and the 'From Location' is 'Chico, CA, USA'. The 'To Location' is 'Sacramento, CA, USA' and the 'Payment Type' is 'Out of Pocket'. The 'Request' is '11/04/2020, \$103.50 - Request'. The 'Vehicle ID' is 'Personal Car', 'Distance to Date' is '0', 'Distance' is '179', and 'Number of Passengers' is '0'. The 'Amount' is '102.93' and the 'Currency' is 'US, Dollar'. The 'Reimbursement Rates' are 'USD 0.575 per mile'. A 'Mileage Calculator' link is highlighted with a red box.</p>

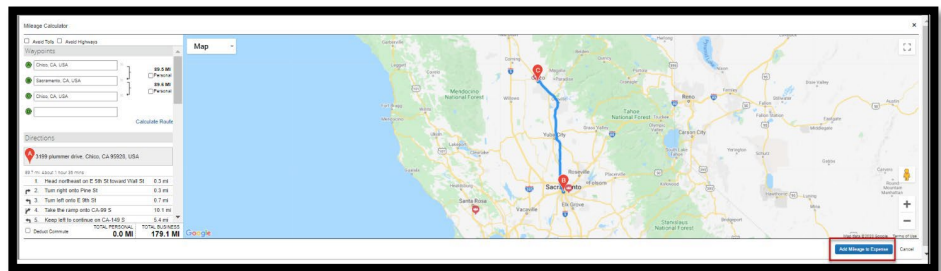
Processing Steps

Click the **Mileage Calculator** link and review and update the route as appropriate.

If round trip mileage should be calculated, click **Make Round Trip**.

Click **Add Mileage to Expense**.

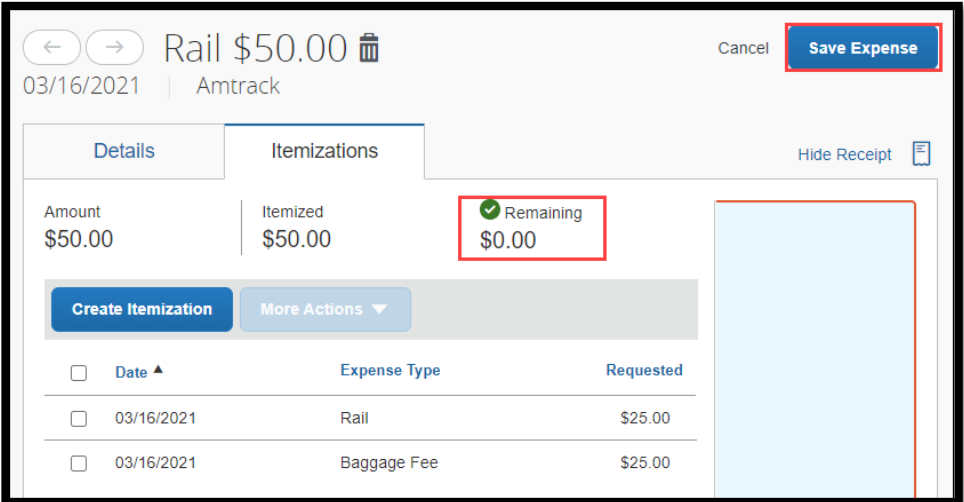

Click **Save**



3.0 Itemizing Expenses

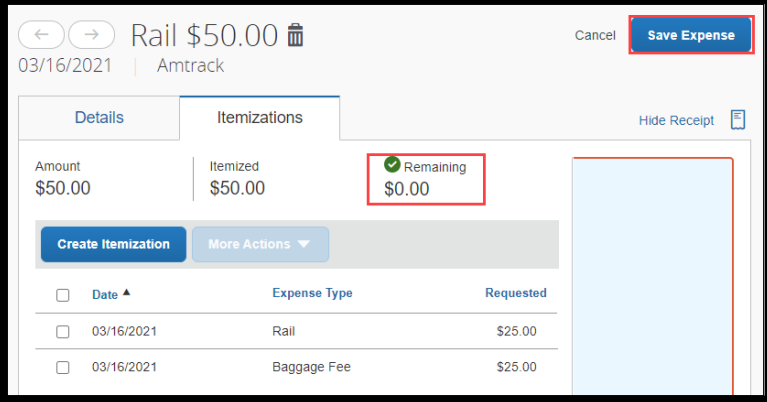
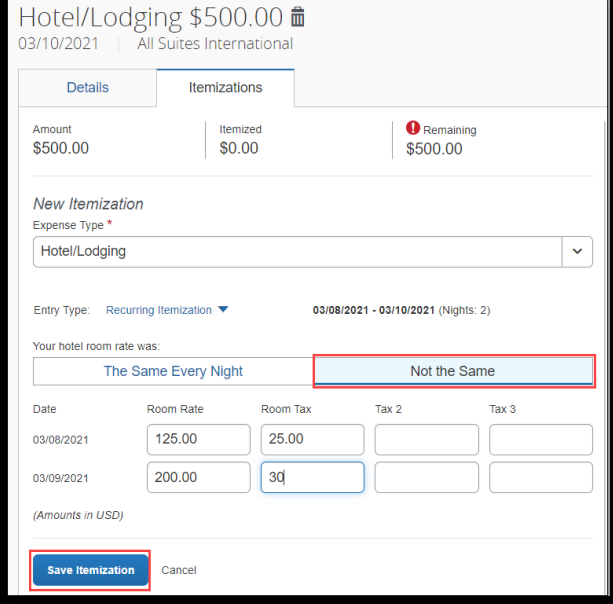
Use the Itemize feature to account for transactions that should be charged to multiple expense types (accounts codes). Itemization should be completed prior to Allocation (charging to multiple chartfields).

3.1 To itemize a general expense:

Processing Steps	Screenshot
<p>Add the expense as usual and then click Itemizations tab. The itemized amount must match the total expense.</p> <p>Select Create Itemization button, select the expense type that applies to the first itemization.</p> <p>The page refreshes, displaying the required and optional fields for the selected expense type.</p> <p>Complete the fields as required. Click Save Itemization.</p> <p>Repeat for each additional itemization, on the Itemization tab, until the Remaining amount is \$0.00.</p>	
<p>Click Save Expense.</p> <p>The expense will now reference an "itemized" note under the amount.</p>	

3.2 To itemize a hotel expense:

A hotel folio typically contains a variety of expenses including room fees, taxes, parking, meals, Wi-Fi charges, and maybe personal items. You must itemize these expenses so that they can be reimbursed correctly.

Processing Steps	Screenshot
<p>With the Expense Report open, on the Create New Expense tab, select the Hotel/Lodging expense Type. The lodging form will open with the required and optional fields displayed.</p> <p>Complete appropriate fields.</p>	
<p>Click Itemizations tab then Create Itemization button. Search/select the Hotel/Lodging expense type.</p> <p>The number of nights and dates involve appear automatically.</p> <p>Select the Same Every Night or Not the Same depending on the respective hotel details. <i>If not the same each night (i.e. increase for weekends, etc.) this option will let you note the differences from day to day, otherwise select same every night to itemize full cost of stay by respective classification.</i></p> <p>Enter the Room Rate, Room Tax, and Additional Charges.</p> <p>Click Save Itemization.</p> <p>Repeat for each additional itemization, on the Itemization tab, until the Remaining amount is \$0.00.</p> <p>Click Save Expense.</p>	

Processing Steps	Screenshot
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Hotel/Lodging \$500.00

03/10/2021 | All Suites International

Details
Itemizations

Amount \$500.00	Itemized \$0.00	Remaining \$500.00
--------------------	--------------------	-----------------------

New Itemization

Expense Type *

Entry Type: Recurring Itemization ▼ 03/08/2021 - 03/10/2021 (Nights: 2)

Your hotel room rate was:

The Same Every Night
Not the Same

Room Rate (per night) *	Room Tax (per night)	Tax 2 (per night)	Tax 3 (per night)
<input type="text" value="200.00"/>	<input type="text" value="20.00"/>	<input type="text"/>	<input type="text"/>

(Amounts in USD)

Save Itemization
Cancel

Continue to itemize the amounts until the balance is \$0.00.

Details
Itemizations

Amount \$315.00	<div style="border: 1px solid red; padding: 2px;">Itemized \$0.00</div>	Remaining \$315.00
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Hotel/Lodging \$500.00

03/10/2021 | All Suites International

Details
Itemizations

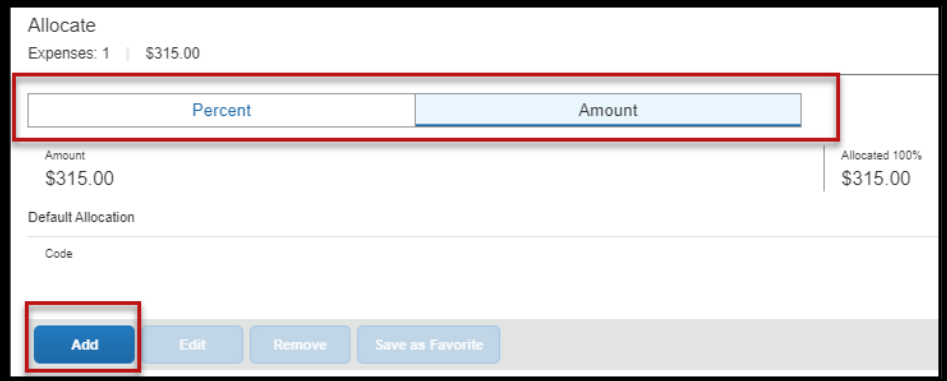
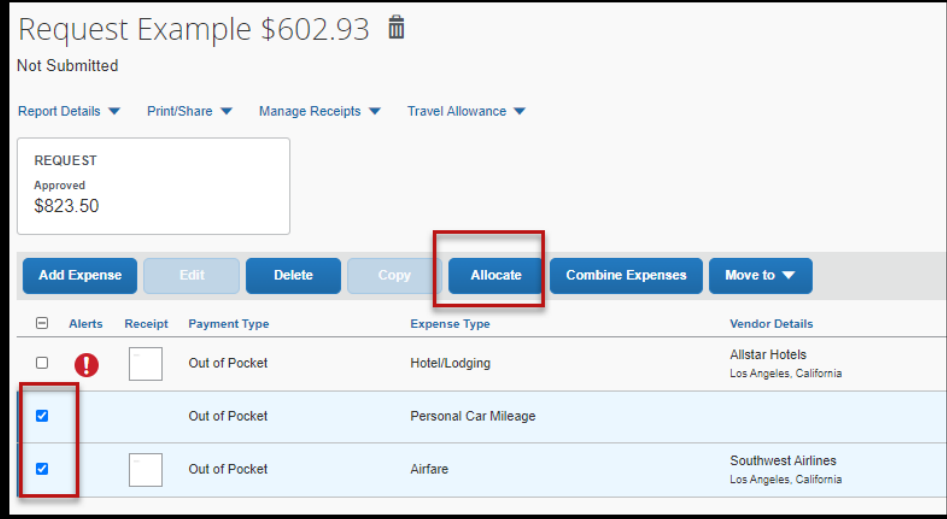
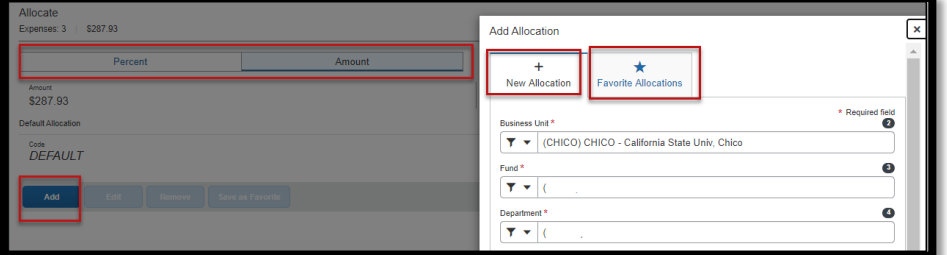
Amount \$500.00	Itemized \$500.00	Remaining \$0.00
--------------------	----------------------	---------------------

Create Itemization
More Actions ▼

<input type="checkbox"/>	Date ▲	Expense Type	Requested
<input type="checkbox"/>	03/08/2021	Hotel/Lodging	\$200.00
<input type="checkbox"/>	03/08/2021	Hotel/Lodging Tax	\$25.00
<input type="checkbox"/>	03/09/2021	Hotel/Lodging	\$200.00
<input type="checkbox"/>	03/09/2021	Hotel/Lodging Tax	\$25.00
<input type="checkbox"/>	03/10/2021	Parking/Tolls	\$50.00

4.0 Allocating Expenses

The Allocations feature allows you to allocate selected expenses to multiple chartfields. This should be performed after the Itemization if allocating to multiple expense types.

Processing Steps	Screenshot
<p>Allocate single expense - With the report open, select a single expense and click Allocate. Select Percent or Amount, then Add and enter the new chartfield designation.</p>	
<p>To allocate multiple expenses (or the entire report), select the expenses and then select the Allocate button.</p>	
<p>Select Percent or Amount, then Add and enter the new chartfield designation. Click Save.</p>	

5.0 Receipts

The Allocations feature allows you to allocate selected expenses to multiple chartfields. This should be performed after the Itemization if allocating to multiple expense types.

5.1 Using Available Receipts Library

Users can upload images to the **Available Receipts** library which stores the receipt until the user is ready to attach it to an Expense Report. Receipts can be uploaded to **Available Receipts** using various methods.

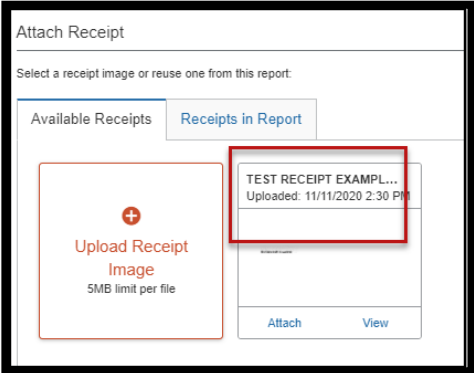
5.2 Email or Forward Receipts to your Concur Profile

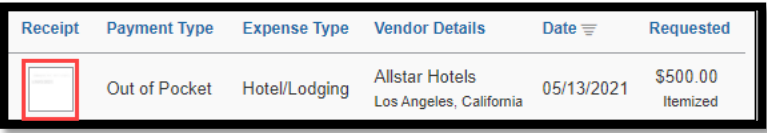
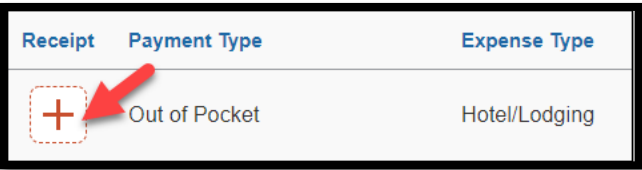
1. Before emailing receipts to the **Available Receipts** library, you must verify your email address for verification in the **Personal Information** section of your Profile.
2. Click **Profile > Profile Settings**. The Profile Options page appears.
3. On the left-hand side of the screen, click **Personal Information**.
4. On the **Personal Information** screen, scroll down to the **Email Addresses** section.
5. Follow the below steps to verify your email address:
 - a. Once you have saved an email address, click Verify.
 - b. Check your email for a verification message from Concur.
 - c. Copy the code from the email message into the Enter Code box next to the email address.
 - d. Click OK to submit the code and complete verification.
6. Prepare an email to **receipts@concur.com**, attach the images, and send the email.
7. Forward an existing emailed receipt to **receipts@concur.com**.

5.3 Receipts Captured with Concur App

Any receipts captured using the Concur app will automatically place the images in your **Available Receipts** library and can be attached as described below.

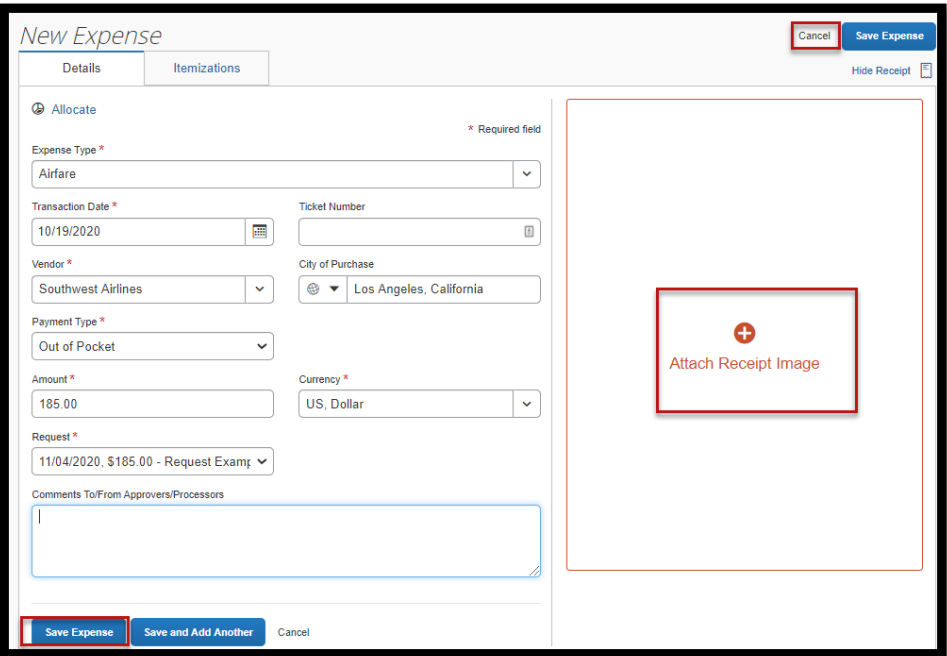
5.4 To Attach a Receipt Image to an Expense Entry Using Available Receipts

Processing Steps	Screenshot
<p>In the Expense Report, select an expense entry to open it in Detail view.</p> <p>Click Attach Receipt Image > View Available Receipts.</p>	

Processing Steps	Screenshot
<p>Select the appropriate image and choose Attach. Click Save.</p>	 <p>The screenshot shows a table with columns: Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. The 'Receipt' column contains a small icon of a document with a plus sign, which is highlighted by a red rectangular box. The other columns contain the following data: Payment Type: Out of Pocket; Expense Type: Hotel/Lodging; Vendor Details: Allstar Hotels, Los Angeles, California; Date: 05/13/2021; Requested: \$500.00 Itemized.</p>
<p>You can also attach a receipt by clicking on the plus sign (+) within the expense line.</p>	 <p>The screenshot shows a table with columns: Receipt, Payment Type, and Expense Type. The 'Receipt' column contains a plus sign (+) icon inside a dashed red box. A red arrow points from the right towards this icon. The other columns contain the following data: Payment Type: Out of Pocket; Expense Type: Hotel/Lodging.</p>

5.5 Uploading Scanned Documents

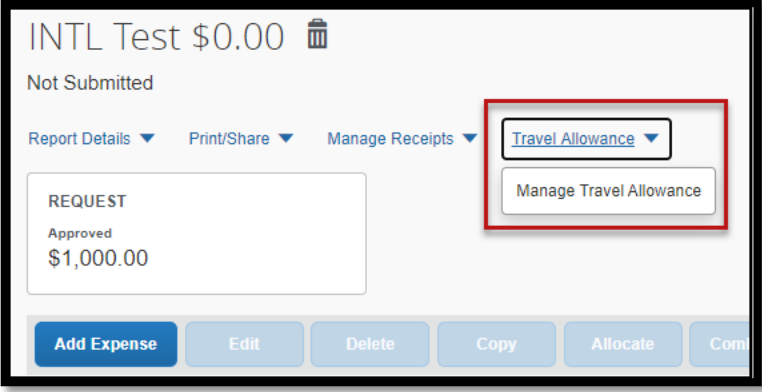
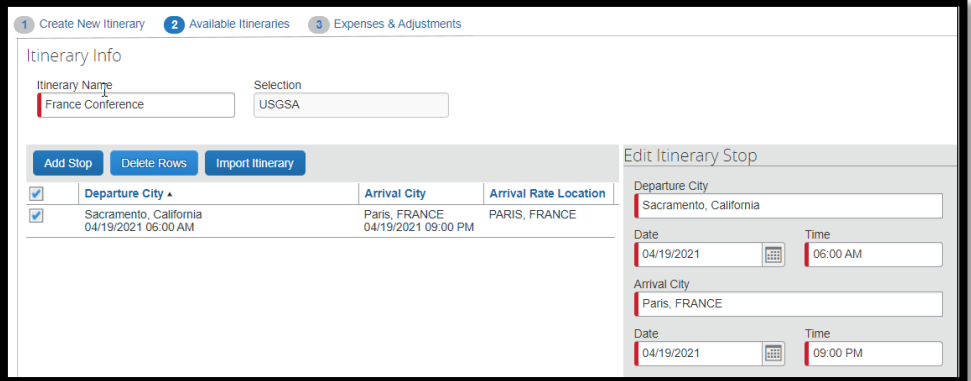
Files scanned and saved to a folder on your computer may be uploaded directly into an Expense Report using the following steps:

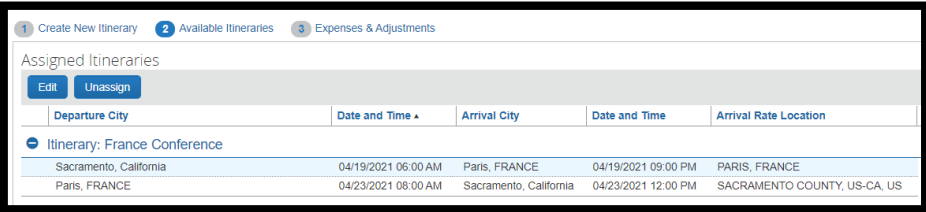
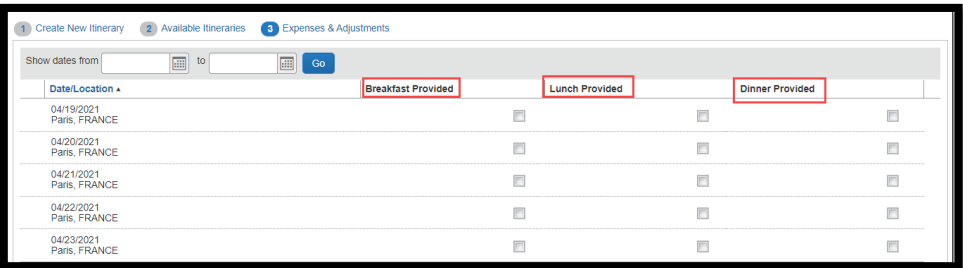
Processing Steps	Screenshot
<p>With your transaction open, select Attach Receipt. Click Attach.</p>	 <p>The screenshot shows the 'New Expense' form. On the right side, there is a large red-bordered box containing a plus sign (+) and the text 'Attach Receipt Image'. At the bottom left of the form, the 'Save Expense' button is highlighted with a red box. The form includes various input fields for details such as Expense Type (Airfare), Transaction Date (10/19/2020), Vendor (Southwest Airlines), Payment Type (Out of Pocket), Amount (185.00), and Request (11/04/2020, \$185.00 - Request Exam). Buttons for 'Save Expense', 'Save and Add Another', and 'Cancel' are visible at the bottom.</p>

6.0 International Travel

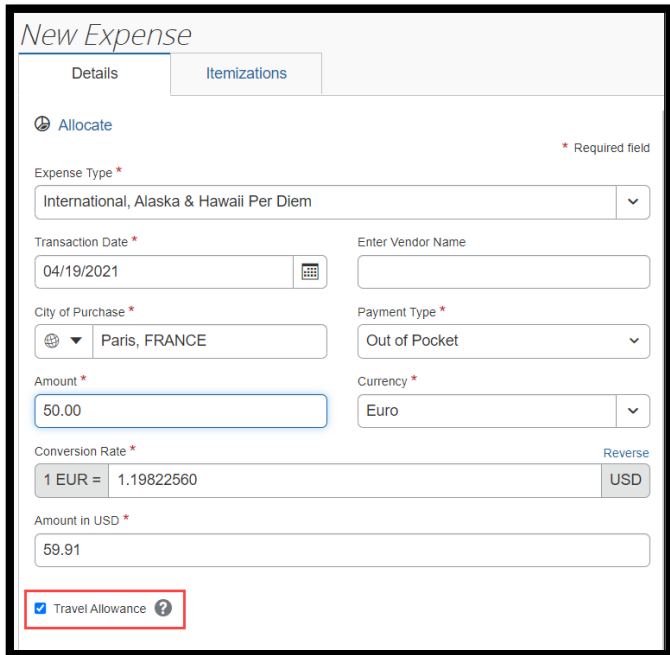
6.1 Travel Allowance

International, Alaska & Hawaii trips will require **Travel Allowance** itineraries to be created to utilize GSA per diem amounts, which are used as ceiling amounts for related expenses.

Processing Steps	Screenshot
<p>Create or open your related expense report and select the Travel Allowance hyperlink, then Manage Travel Allowance to build your trip itinerary.</p>	
<p>The Travel Allowances window will appear allowing you to build your trip itinerary. Select Create New Itinerary and enter the first leg of your trip and click Save.</p> <p>Continue entering all legs of the trip by selecting the Add Stop button. <i>An itinerary must consist of at least 2 legs; one leg for departure details and a second leg for your return details.</i></p> <p>When all portions of the trip are entered, click Next.</p>	

Processing Steps	Screenshot
<p>On the Available Itineraries tab, you can view the itinerary that you have assigned to this trip.</p>	 <p>The screenshot shows the 'Available Itineraries' tab with a table of assigned itineraries. The table has columns for 'Departure City', 'Date and Time', 'Arrival City', 'Date and Time', and 'Arrival Rate Location'. The itinerary is for a 'France Conference' with two legs: Sacramento, California to Paris, FRANCE on 04/19/2021 at 06:00 AM, and Paris, FRANCE to Sacramento, California on 04/23/2021 at 08:00 AM. The arrival rate location is Sacramento County, US-CA, US.</p>
<p>Click the Expense & Adjustments tab to mark any meals which were provided during your trip. Then click Create Expenses to return to the expense report and add trip costs.</p> <p>You can begin adding either out-of-pocket expenses and/or University Credit Card transactions to your Expense Report.</p>	 <p>The screenshot shows the 'Expense & Adjustments' tab with a table of dates and locations. The table has columns for 'Date/Location', 'Breakfast Provided', 'Lunch Provided', and 'Dinner Provided'. The dates are 04/19/2021, 04/20/2021, 04/21/2021, 04/22/2021, and 04/23/2021, all for Paris, FRANCE. The checkboxes for 'Breakfast Provided', 'Lunch Provided', and 'Dinner Provided' are highlighted with red boxes.</p>

6.2 Converting Foreign Currency Transactions

Processing Steps	Screenshot
<p>With the Expense Report open, click Add Expense, and then enter the appropriate information in the required and optional fields (required fields are indicated with a red asterisk).</p> <p>For the Amount field enter the amount spent in foreign currency. The correct currency should populate based on the City of Purchase information you entered.</p>	 <p>The screenshot shows the 'New Expense' form with the following fields: 'Expense Type' (International, Alaska & Hawaii Per Diem), 'Transaction Date' (04/19/2021), 'City of Purchase' (Paris, FRANCE), 'Amount' (50.00), 'Currency' (Euro), and 'Conversion Rate' (1 EUR = 1.19822560). The 'Amount' field is highlighted with a red box. The 'Travel Allowance' checkbox is checked and highlighted with a red box.</p>

Processing Steps

Expense will calculate the amount in USD.

If expense amount is already in USD, enter amount in **Amount in USD** field and it will calculate the foreign amount for you.

Complete the remaining fields as appropriate and make sure the **Travel Allowance** box is checked before saving the expense. *This is what will be used to check the amount against the GSA travel allowance rates for that specific destination. If this box is not checked the report will not be able to be submitted until that occurs.*

Review summary of actual costs in relation to allowance ceiling.

The example intentionally shows an expense more than the allowance ceiling to demonstrate the adjustment that will be made to the reimbursable amount of the traveler. Actual expenses, up to the allowance ceiling are reimbursable.

Travel Allowances For Report: France Conference

Reimbursable Allowances Summary

	Expense Type	Allowance Limit	Expense Total	Above Allowable Limit
04/19/2021 (Paris, FRANCE)				
+	Lodging	\$435.00	\$0.00	\$0.00
+	Meal	\$141.75	\$179.73	\$37.98
04/20/2021 (Paris, FRANCE)				
+	Lodging	\$435.00	\$0.00	\$0.00
+	Meal	\$189.00	\$0.00	\$0.00
04/21/2021 (Paris, FRANCE)				
+	Lodging	\$435.00	\$0.00	\$0.00
+	Meal	\$189.00	\$0.00	\$0.00
04/22/2021 (Paris, FRANCE)				
+	Lodging	\$435.00	\$0.00	\$0.00
+	Meal	\$189.00	\$0.00	\$0.00
04/23/2021 (Paris, FRANCE)				
+	Lodging	\$0.00	\$0.00	\$0.00
+	Meal	\$141.75	\$0.00	\$0.00

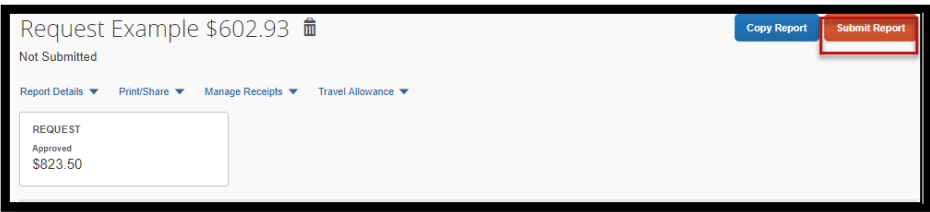
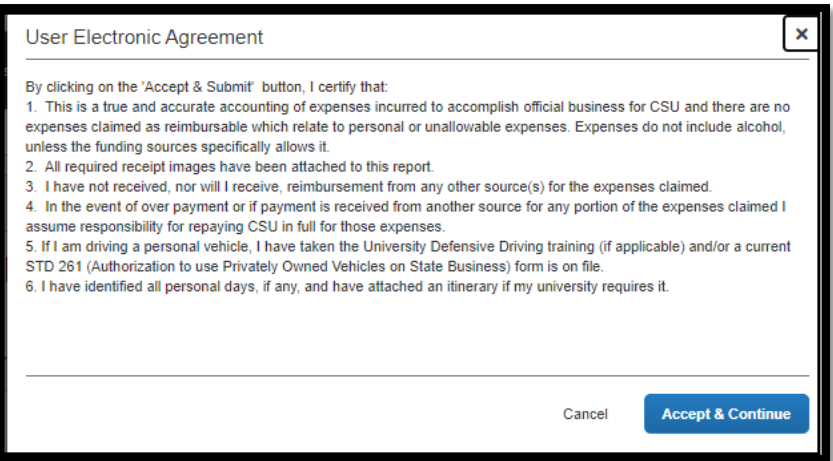
Annotations:

- Allowance ceiling. Maximum amount reimbursed (points to \$141.75)
- Actual Costs (points to \$179.73)
- Amount in excess of ceiling (points to \$37.98)

7.0 Blanket Mileage Claims

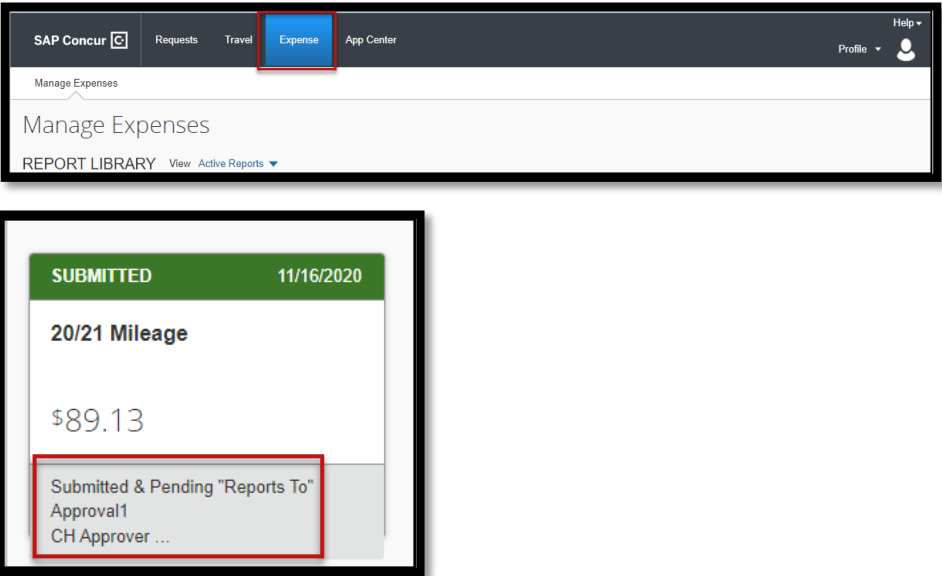
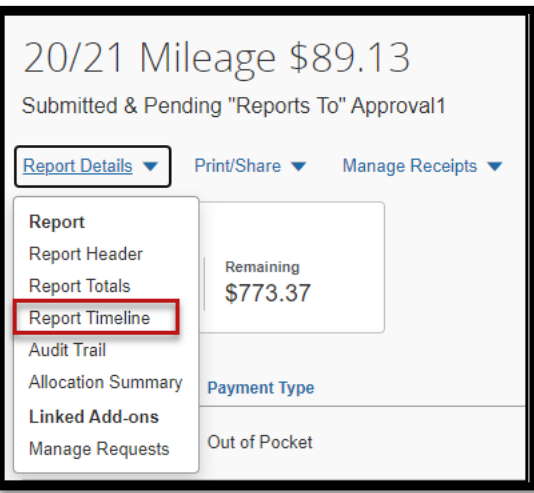
There are situations where a travel request may be submitted, for mileage and parking only, for an entire fiscal year. While the travel request covers the full fiscal year, an expense report can be submitted monthly, at the closure of each calendar month. Start the expense report like any other, note the total miles for that month. Enter in the mileage for the month or reporting period and submit for approval.

8.0 Submitting an Expense Report

Processing Steps	Screenshot
On the expense report, click Submit Report .	 A screenshot of a web application interface for submitting an expense report. At the top, it says "Request Example \$602.93" with a trash icon. Below that, it says "Not Submitted". There are two buttons: "Copy Report" (blue) and "Submit Report" (red). Below these are four dropdown menus: "Report Details", "Print/Share", "Manage Receipts", and "Travel Allowance". At the bottom, there is a box labeled "REQUEST" with the text "Approved \$823.50".
The Final Review window appears with the User Submit Agreement. By clicking Accept & Continue , the user is accepting the terms and conditions of the agreement.	 A screenshot of a "User Electronic Agreement" dialog box. The title bar says "User Electronic Agreement" with a close button (X). The text inside reads: "By clicking on the 'Accept & Submit' button, I certify that:" followed by a numbered list of six terms and conditions. At the bottom, there are two buttons: "Cancel" and "Accept & Continue" (blue).

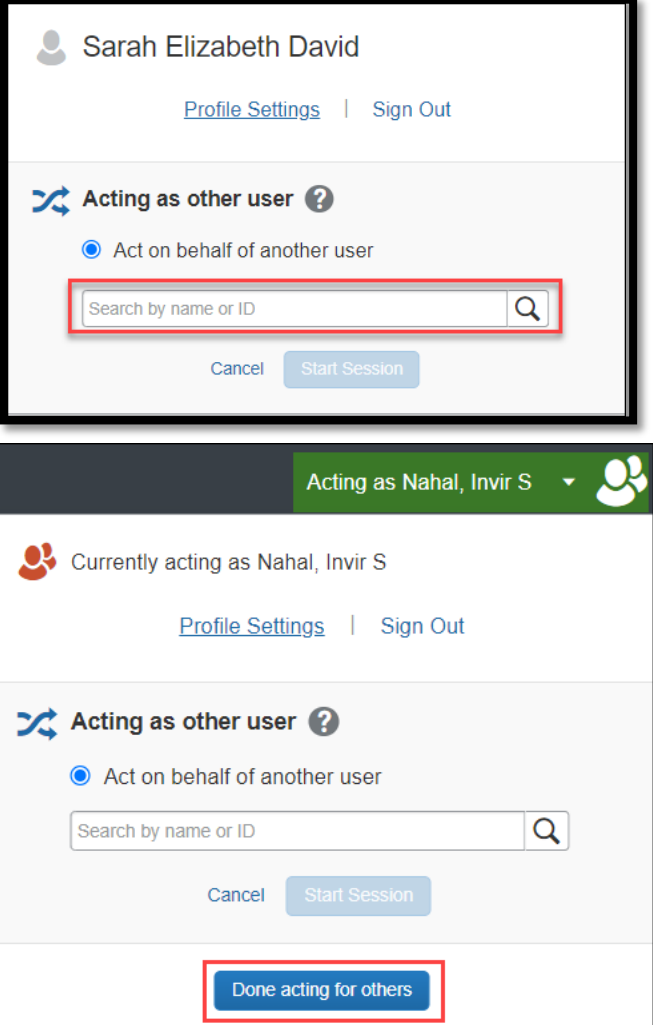
9.0 Tracking Status of an Expense Report

You can review the status of your submission in two different ways. Either way will show you what stage of the approval workflow your report is in.

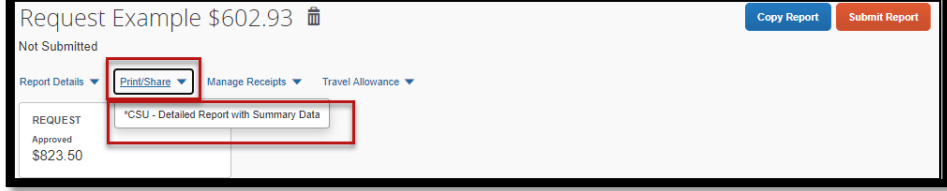
Processing Steps	Screenshot																									
<p>When logged in you can select the Expense module and take note of the status on that report's tile.</p>																										
<p>Alternatively, you can open the expense report and select the Report Details hyperlink, then select Report Timeline.</p>																										
<p>The Report Timeline will show what approvals have occurred thus far and where it is in the flow. <i>In the example this report is with the "Reports To" Approver2.</i></p>	 <table border="1" data-bbox="893 1491 1315 1774"> <thead> <tr> <th>EXPENSE COMMENT</th> <th>Personal Car Mileage</th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>05/21/2021 Laguna Creek High School</td> <td>04/14/2021</td> <td>\$17.36</td> <td>View</td> <td></td> </tr> <tr> <td>05/21/2021 Laguna Creek High School</td> <td>04/29/2021</td> <td>\$17.36</td> <td>View</td> <td></td> </tr> <tr> <td>05/21/2021 Laguna Creek High School</td> <td>05/19/2021</td> <td>\$17.36</td> <td>View</td> <td></td> </tr> <tr> <td>05/21/2021 Ed Harris Middle School, Elk Grove, CA</td> <td>04/13/2021</td> <td>\$15.12</td> <td>View</td> <td></td> </tr> </tbody> </table>	EXPENSE COMMENT	Personal Car Mileage				05/21/2021 Laguna Creek High School	04/14/2021	\$17.36	View		05/21/2021 Laguna Creek High School	04/29/2021	\$17.36	View		05/21/2021 Laguna Creek High School	05/19/2021	\$17.36	View		05/21/2021 Ed Harris Middle School, Elk Grove, CA	04/13/2021	\$15.12	View	
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10.0 Acting as a Delegate

If you have been assigned to work as a delegate, your delegator will define which tasks you can complete.

Processing Steps	Screenshot
<p>Click Profile > Act on behalf of another user.</p> <p>Type the name or select the appropriate delegator's name in the drop down.</p> <p>Click Start Session.</p> <p>NOTE: Notice that the Profile menu now displays Acting as and shows the name you just selected.</p> <p>You are now officially working on behalf of that person. Complete the normal processes of creating reports, attaching receipts, etc. To select a different user, follow the same steps but click a different name.</p> <p>To return to your own tasks, click Acting as and then Done acting for others button.</p>	 <p>The first screenshot shows the user profile for Sarah Elizabeth David. Below the profile information, there is a section titled 'Acting as other user' with a question mark icon. Underneath, there is a radio button selected for 'Act on behalf of another user' and a search box labeled 'Search by name or ID'. A 'Start Session' button is visible at the bottom.</p> <p>The second screenshot shows the user profile for Nahal, Invir S. The top bar indicates 'Acting as Nahal, Invir S'. Below, it says 'Currently acting as Nahal, Invir S'. The 'Acting as other user' section is identical to the first screenshot. A 'Done acting for others' button is highlighted with a red box at the bottom.</p>

11.0 Printing an Expense Report

Processing Steps	Screenshot
<p>On the Expense Report page, click Print/Share, and then select *CSU-Detailed Report with Summary Data.</p>	 <p>The screenshot shows an expense report page for 'Request Example \$602.93'. The status is 'Not Submitted'. There are buttons for 'Copy Report' and 'Submit Report'. A dropdown menu is open under 'Report Details', showing 'Print/Share' selected. Below this, another dropdown menu is open, showing '*CSU - Detailed Report with Summary Data' selected. The report details show 'REQUEST Approved \$823.50'.</p>

Processing Steps	Screenshot
Click Print or Save as PDF or Email to get complete packet for expense report (includes copies of receipts attached).	