Getting Started Guide for Supervisors and Cost Approvers

Follow this guide to learn about the supervisor or cost approver role and to get started using the travel and expense reimbursement system Concur.

Supervisors

Supervisors use the travel and expense reimbursement system to review and approve expense reports submitted by the employees that they supervise in the time and attendance system. Supervisors review reports to:

- Ensure accuracy and completeness.
- Confirm the required receipt and supporting documentation images are attached.
- Verify the expenses are allowable and in compliance with UB business rules.
- Allocate expenses to the correct account if they are also the cost approver.

Cost Approvers

Cost approvers use the travel and expense reimbursement system to allocate expenses on an expense report to the correct account. They allocate the expenses to the accounts for which they are designated as the authorized signatory. Cost approvers review reports to:

- Confirm or change the funding source.
- Verify the expenses are allowable and in compliance with UB business rules.
- Allocate expenses to the correct account.

Getting Started

Please reserve a few minutes to complete the following. When finished, you may begin using the travel and expense reimbursement system.

1. Watch the Training Videos
   - To see an overview of the system, log into UB EDGE and watch the training videos.

2. Log into the System and Set Up Your Profile
   - Go to the travel and expense reimbursement system web page.
     - Click the Log into Concur button and sign in with your UBITName and password.
   - Follow these instructions to set up your profile.

3. Learn the System Roles
   - Each person in your department has a specific role in the travel and expense system. Your department cannot successfully submit expense reports without the participation of each role.
     - Learn about the roles in the travel and expense system by clicking the tab for each role.

For travel and expense system support, email ubs-travel-expense-support@buffalo.edu
4. **Review Training Resources**
   - Go to the [travel and expense system tip sheets and videos](#) web page for system instructions.

5. **Get System Help**
   System users are encouraged to follow these steps for help and support:

   1. **Review Tip Sheets and Videos**
      - Review tip sheets and videos for instructions to use the system.
      - Go to the [travel and expense system tip sheets and videos](#) web page.

   2. **Contact Travel and Expense System Support**
      - Send an email to: ubs-travel-expense-support@buffalo.edu
      - Call 716-645-4500, press 2 for the travel and expense reimbursement system.
      - Click the live chat button on the [travel and expense reimbursement system](#) and [travel and expense tip sheets and videos](#) web pages to connect with a member of our Customer Support team.

   3. **Register for Training**
      - [Register for a training session](#) or hands-on lab session to learn how to use the travel and expense system.

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