Getting Started Guide for Supervisors and Cost Approvers

As a Supervisor or Cost Approver, use this guide to learn about your role and how to get started using the online travel and expense reimbursement system Concur.

Supervisors
As a Supervisor, you will review and approve employee expense reports submitted for reimbursement in the travel and expense system. You will review reports for the employees that you supervise in the time and attendance system.

Review reports to:
- Confirm the report has been completed correctly
- Ensure the attached receipts and supporting documentation are correct
- Verify the expenses on the report are allowable and in compliance with UB business rules
- Allocate expenses to the correct account if you are also the Cost Approver

Cost Approvers
As a Cost Approver, you will allocate expenses to the correct account in the travel and expense system. You will allocate expenses to the accounts for which you are designated as the authorized signatory.

Review reports to:
- Confirm the report has been completed correctly
- Verify or change the funding source
- Verify the expenses on the report are allowable and in compliance with UB business rules
- Allocate expenses to the correct account

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

1. Watch the Training Video
   - For an overview of the travel and expense system and how you will use it, log in to UB Edge to watch the training video.
     - More training videos will be added to UB Edge as they become available.

2. Log in to the Travel and Expense System to Complete Your Profile
   - To log in, go to the Travel and Expense Reimbursement System webpage.
     - Click the blue login button and sign in using your UBITName and password.
   - Follow these instructions to set up your profile.
   - Follow these instructions to activate e-receipts.

3. Learn About Your Role
   - Everyone 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.
To learn about your role and the steps you will follow, go to the Travel and Expense Reimbursement System webpage.
  o In the section On This Page, click Roles in Concur Travel and Expense System then click the tab for your role.

4. Access Training Resources
   - Go to the Travel and Expense Training Resources webpage.
     o Access training tip sheets and videos for instructions to use the system.

5. Follow Department Controls to Prevent Duplicate Transactions
   - During the transition to the travel and expense system, Supervisors and Cost Approvers must follow internal controls to safeguard against duplicate travel and non-travel expense reimbursements from being submitted for payment.
   - Department Cost Approvers must follow internal controls to prevent duplicate transaction approvals that could occur during the switch from paper to online reimbursements.

6. Contact for Training, Help and Support
   - If you have any questions, contact one of our department liaisons:
     o To find our department liaisons, go to the Travel and Expense Training Resources webpage.
     o In the section Training Sessions, click Find Your Department Liaisons.
     o Click to download the list of department liaisons.
   - If you require further assistance, contact the UB Travel and Expense Team:
     o Email: ubs-travel-expense-support@buffalo.edu
     o Call: 716-645-4500, press 2 for the travel and expense system