Getting Started Guide for Travelers and Non-Travelers

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

Travelers
As a traveler, you can use the travel and expense system to request and book your business travel arrangements, and you will use it to submit your business travel expenses for reimbursement.
- The travel and expense system is now the preferred method for booking your travel arrangements as The Travel Team Inc. service fees will no longer be charged.

Non-Travelers
As a non-traveler, you will use the travel and expense system to submit your business non-travel expenses for reimbursement.

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.
     - 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.
     - Access training tip sheets and videos for instructions to use the system.

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