Getting Started Guide for Supervisors and Cost Approvers

Supervisors and Cost Approvers can use this guide to learn about their role and how to get started using the travel and expense reimbursement system Concur.

Supervisors
Supervisors review and approve employee expense reports submitted for reimbursement in the travel and expense system. They review reports for the employees that they supervise in the time and attendance system.

Supervisors 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 they are also the Cost Approver

Cost Approvers
Cost Approvers allocate expenses to the correct account in the travel and expense system. They allocate expenses to the accounts for which they are designated as the authorized signatory.

Cost Approvers 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

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

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

2. Log into the Travel and Expense System to Complete Your Profile
   - To log in, go to the Travel and Expense Reimbursement System webpage.
     - Click the Log in to Concur button and sign in with 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.
     - Learn About the Roles in the Travel and Expense System by clicking the tab for your role.

4. Review Training Resources
   - Go to the Travel and Expense System Tip Sheets and Videos webpage.
     - Review tip sheets and videos for instructions to use the system.
5. **Getting Help**

System users should follow these hierarchical steps for help and support:

1. **Contact Department Liaisons**
   - Department liaisons serve as the points of contact for travel and expense system training and support in each department.
   - Liaisons are familiar with individual department processes and can assist faculty and staff in getting their expenses reimbursed.
   - [Find Your Department Liaisons](#) and download the list.

2. **Review Tip Sheets and Videos**
   - Review tip sheets and videos for instructions to use the system.
   - Go to [Travel and Expense System Tip Sheets and Videos](#) webpage.

3. **Contact Travel and Expense System Support**
   - Email: ubs-travel-expense-support@buffalo.edu
   - Call 716-645-4500, press 2 for the travel and expense reimbursement system.
   - Click the Live Chat button to connect with a member of our Customer Support team.