Getting Started Guide for Travelers and Non-Travelers
Follow this guide to learn about the traveler or non-traveler role and to get started using
the travel and expense reimbursement system Concur.

Travelers
Travelers can use the travel and expense reimbursement system to request and book business travel
arrangements, and will use it to submit business travel expenses for reimbursement.

- The travel and expense reimbursement system is the preferred method for making travel
arrangements as there are no service fees charged for bookings.

Non-Travelers
Non-travelers use the travel and expense reimbursement system to submit business non-travel
expenses for reimbursement.

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.

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.

For travel and expense system support, email ubs-travel-expense-support@buffalo.edu
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.