

Getting Started Guide for Travelers and Non-Travelers

Travelers and non-travelers can follow this guide to learn about their role and to get started using the travel and expense system.

Traveler Role

Travelers are individuals who travel on behalf of UB. They can request, book and submit their business travel expenses for reimbursement in the travel and expense system.

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

Non-Traveler Role

Non-travelers are individuals who have business non-travel expenses for reimbursement. They will submit their business non-travel expenses for reimbursement in the system.

Getting Started Steps

Travelers and non-travelers should complete the following steps to get started using the travel and expense system.

1. [Review System Roles](#)

Each person in your department has a specific role in the system. Your department cannot successfully submit expense reports without the participation of each role. Review the system roles to see how they work together.

- [Review Travel and Expense System Roles](#)

2. [Learn About System Modules](#)

Learn about the three modules in the travel and expense system that you will use to complete your work.

- [Learn About System Modules](#)

3. [Watch Training Videos](#)

For an overview of the system, log into UB EDGE and watch the training videos.

- [Watch Training Videos in UB EDGE](#)

4. [Set Up Your Profile](#)

To set up your profile, log into the travel and expense reimbursement system Concur and go to your *Profile Settings*.

- Refer to the tip sheet *Set Up Your Travel and Expense System Profile* for detailed instructions to set up your profile.

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

5. Review Training Resources

Review tip sheets and videos for step-by-step instructions to use the system.

- [Go to Travel and Expense System Tip Sheets and Videos](#)

6. Register for Training

Register for a training or hands-on lab session to learn how to use the system.

- [Register for a Training Session](#)

7. Contact Business Services Customer 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 on the [travel and expense reimbursement system](#) and [travel and expense system tip sheets and videos](#) web pages to connect with a member of our Customer Support team.