Getting Started Guide for Travelers and Non-Travelers

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

Travelers
Travelers can use the travel and expense system to request and book business travel arrangements, and will use it to submit business travel expenses for reimbursement.
- The travel and expense system is the preferred method for booking travel arrangements as there are no service fees charged.

Non-Travelers
Non-travelers use the travel and expense 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 system.

1. Watch the Training Videos
   - For an overview of the travel and expense system and how you will use it, log into 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 the [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.