

# The Perfect Business Trip at UB:

## Use the Travel and Expense System (Concur) to Plan, Book and Expense Your Trip

### 1. Plan Your Business Trip

Requests are required, use the Request module in the travel and expense system (Concur) to plan your business trip:

- Go to [buffalo.edu/travel-expense-system](http://buffalo.edu/travel-expense-system) and click *Log in to Concur*.
- Create and submit a request to your supervisor for your estimated travel expenses before you incur them.
- **Note: A request is used for pre-approval purposes only, and will NOT result in reimbursement. The total amount for the request should be a estimate of what the actual costs will be.**



### 2. Book Your Business Travel Reservations

Use the optional booking tool in the travel and expense system to book your business travel reservations:

- The *Trip Search* booking tool in the system is contracted through The Travel Team Inc., and there are no service fees charged for bookings.
- Log in to Concur. On the home page, use *Trip Search* to search for travel reservations.
- Select the airfare, car, hotel or train icons. Enter your trip information and click *Search*.
- Book the travel reservations that work best for you, and also follow UB travel policy.
- After booking your travel reservations, you will receive an email confirmation to the email address you verified in your Concur profile.
- For questions about travel bookings made in the system, contact The Travel Team Inc.:
  - Local: 716-332-6500 Toll free: 877-592-3555
  - Email: [online@thetravelteam.com](mailto:online@thetravelteam.com)



### 3. Go On Your Trip!



### 4. Organize Your Receipts as You Travel

There are several options to organize your receipts and begin preparing your expense report as you travel:

- Download the Concur Mobile app on your mobile device and use it to take pictures of your paper receipts.
- Email pictures of your paper receipts to [receipts@concur.com](mailto:receipts@concur.com)
- Activate e-receipts in your Concur profile to receive e-receipts from participating suppliers. This includes receipts for airline tickets, hotel reservations, car rentals and even some conference registration fees.



### 5. Create an Expense Report for Your Trip

When you return home, create an expense report to submit your allowable expenses for reimbursement:

- Log in to Concur. Click *Request* in the top menu bar, then click on the approved request for your trip. Once in the approved request, click on "Create expense report" button to tie the request to the expense report you are about to create
- On the report header, complete the required fields. At the bottom, click *Yes* or *No* if you are claiming travel allowance
- If *Yes*, create a travel itinerary and choose either *Actuals* or *Per Diem* as your meal selection.
- On the *Manage Expenses* screen, add the appropriate expense types to your report to submit them for reimbursement.
- When finished, click *Submit Report*.

Go to [buffalo.edu/business-travel](http://buffalo.edu/business-travel) to review UB's traveling for business guidelines. Please note the expense must be completed within 120 days of your return date.



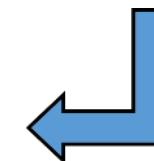
### 6. Get Help Using the Travel and Expense System

1. Review tip sheets and videos for instructions to use the system:
  - Go to [buffalo.edu/travel-expense-system](http://buffalo.edu/travel-expense-system) and click *Go to Travel and Expense System Tip Sheets and Videos*.
2. Contact Business Services Customer Support:
  - Email - [ubs-travel-expense-support@buffalo.edu](mailto:ubs-travel-expense-support@buffalo.edu).
  - Call 716-645-4500, press 2 for the travel and expense reimbursement system.
  - Go to [buffalo.edu/travel-expense-system](http://buffalo.edu/travel-expense-system) and click the *Virtual Vic Icon* button for assistance



### 7. Get Reimbursed!

- For State funded reimbursements, you will be reimbursed the same way that you receive your paycheck – either by direct deposit or physical check.
- For Research Foundation or UB Foundation funded reimbursements, you will receive a physical check in the mail.



# Frequently Asked Travel and Expense System (Concur) Questions

## The supervisor in my Concur profile is incorrect. How do I request a change?

- If you are a state funded employee, complete the *Supervisor Change Request for State Employees* form. Go to [buffalo.edu/administrative-services](http://buffalo.edu/administrative-services) and at the very bottom of the page, under *catalog* click *Forms*. Under *employment*, click *supervisor change request*.
- If you are a Research Foundation or UB Foundation funded employee, email your request to [ubs-travel-expense-support@buffalo.edu](mailto:ubs-travel-expense-support@buffalo.edu). Include in the email the traveler and who their supervisor should be.

## How do I create a travel itinerary?

- Go to your approved request in the request module and click on "Create Expense report"
- Click on "Report Details" then "Report Header".
- Fill out all the required fields with a red asterisk. On the bottom of the pop-up, you want to answer the travel allowance question with "yes". This will take you to the next screen of putting in your itinerary.
- On the right hand side you will enter your itinerary with no layovers.

## How do I create per diem meals on my expense report?

- Be sure you created a travel itinerary and chose *Per Diem* as the meal selection.
- Click *Travel Allowance*, then click *Manage Travel Allowance*, then click *Expenses and Adjustment*.
- Click the checkboxes to exclude meals from reimbursement following the 7:00 a.m. - 7:00 p.m. travel guideline, or to exclude meals that were provided.
- When finished, click *Update Expenses*.

## How do I find out who my cost approver is?

- When you submit an expense report for reimbursement, it will go directly to your time and attendance supervisor for approval. Your supervisor will then determine who the cost approver is.
- Depending on your department, your supervisor may also be your cost approver. If not, your supervisor will approve and forward your report to the correct cost approver.

## How do I itemize a hotel expense?

- Add the expense type *Hotel/Airbnb* to your report.
- Complete the required fields with a red asterisk then click the *Itemization* tab.
- Select *Hotel/Airbnb* as expense type and then under entry type, using the drop down menu select *Recurring Itemization* (the rates are the same) or *Single Itemization* (the rates are different).
- Fill in the room rate. You can click on *Same Every Night* or *Not the same* if the rates are different.
- When finished, click *Save Itemizations*.

## As a cost approver, how do I allocate an expense report?

- Open the expense report under the Approvals tab.
- Click Details, then Allocations.
- Click the small box next to the expense line on your report, click Allocate Selected Expenses.
- Update percentage.
- Complete the approver, funding source, entity, and Account.
- Click Save.

## Can I be reimbursed for travel expenses paid in advance of the actual trip dates?

- Yes, but first confirm with your department that this is allowed.
- The only expenses you can ask for reimbursement early are conference fees and airfare.
- Your expense report will need an approved request attached to the report. On your expense report, for the *Start, End* and *Transaction Dates*, enter the date you purchased the transaction.
- All other expenses will need to wait until after the trip ends.

## How do I fix the single itinerary row error message on my report?

This error means your travel itinerary is incomplete. Edit your travel itinerary as follows:

- Click *Travel Allowance*, then click *Manage Travel Allowance*.
- Click on the itinerary with a single row, then click *Edit*.
- Enter the missing leg of your trip, then click *Save*.

## Where do I attach supporting documentation, such as a conference agenda, to my report?

- Click *Manage Receipts*, then click *Manage Attachments*.
- Click "Add" to select the file, then click *Open*.

## How do I view my previously submitted reports?

- Click *Expense* in the top menu bar.
- You will see a list of your *Active Reports*.
- Click *Active Reports* to change to *Sent for Payment* to see recent reports sent for payment.

## Contact Business Services Customer Support for Travel and Expense System Help:

- Email - [ubs-travel-expense-support@buffalo.edu](mailto:ubs-travel-expense-support@buffalo.edu)
- Call 716-645-4500, press 2 then 1 for the travel and expense reimbursement system.
- Go to [buffalo.edu/travel-expense-system](http://buffalo.edu/travel-expense-system) and click the *Live Chat* button to connect with a member of our Business Services Customer Support team.

