Training Overview: Concur Reimbursements

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*Please see the [BFS Knowledge Base Portal](#) for additional information and helpful how-to videos, BFS Concur website for knowledge transfer series recordings, and FAQs.

Prior to Travel/Event: Submit a Request (Pre-Authorization)
- **How to Create and Submit a Request** Video (1:56 min)
  - Refer to the Understanding the Header Row video [Understanding a Concur Header](#) Video (1:19 min). Here are examples of fields you will need to fill out. Same as the paper form.
- **How to Request a Cash Advance** Video (0.33 min)
- **How to Apply a Cash Advance** Video (0.54 min)

Booking Travel in Concur
- **How to book travel in Concur**
  - Use the “UCSB Site Card (...9063)” as a payment method for direct billing. This will automatically populate expenses into your “available expenses” section in Concur.

Returning from Travel: Create an Expense Report (All Expense Types)
- **How to Create an Expense Report from an Approved Request** Video (1:33 min)
- **How to Create an Expense Report on Concur Mobile** (No video)
- **How to Itemize an Expense on Concur Mobile** (No video)
- **Uploading Receipts** Video (1:15 min)
- **Uploading Receipts on Concur Mobile** Video (1:19 min)
  - Pro Tip: Upload your receipts into Concur before starting your expense report.
  - Follow your unit’s protocol on submitting meal receipts.

Business Expense: (e.g., memberships, miscellaneous expenses)
- **How to create a Business Expense Report**
  - Business Expenses cannot be created as a pre-authorization request.
  - Business Expense Reimbursements should always be a last resort, and your Department should direct everyone to use Gateway or use your Department Flexcard for these kinds of purchases.

Delegates & Approvers
- Please follow your internal department protocol for using delegates
- **Delegate Overview** Video (1.34 min)
- **How to Add a Delegate** (No video)
  - If you do not see the employee you want to add as a delegate, please contact your department manager.
- **How to Add an Ad Hoc Approver** (1:31 min)
- **Concur Approvers Guide**