



Training Overview: Concur Reimbursements

Login to Concur <u>here</u>	
Step-by-Step Guides* Travel & Entertainment Business Expenses	Quick overview of Concur Video (3:06 min)

*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](#)