Step-by-Step Guide

Concur travel & Entertainment after the trip

1. Login instructions for Desktop

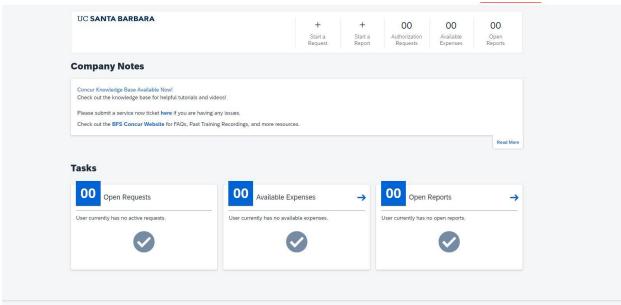
Use the following link to access the site: www.concursolutions.com

- Enter your full UCSB Net ID, including "@ucsb.edu" (ucsbnetid@ucsb.edu)
- Use SSO as authentication method (choose "Sign in with UC Santa Barbara SSO")
- Log in on the UC Santa Barbara SSO site

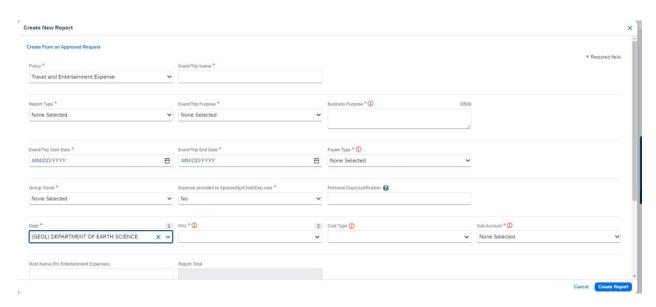
Login instructions for the SAP Concur mobile app

You may also download and use the **SAP Concur** application. Download from the appropriate application store.

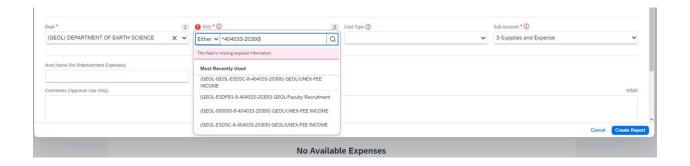
- Enter your full UCSB Net ID, including "@ucsb.edu" (ucsbnetid@ucsb.edu)
- Use SSO as authentication method (choose "Sign in with UC Santa Barbara SSO")
- Get the app for iPad and iPhone https://apps.apple.com/us/app/sap-concur/id335023774
- Get the app for Android devices https://play.google.com/store/apps/details?id=com.concur.breeze&hl=en_US&gl=US
- 2. **Starting an Expense Report** Click "New," then "Start a Report" at the top of the screen to create a new Expense Report.



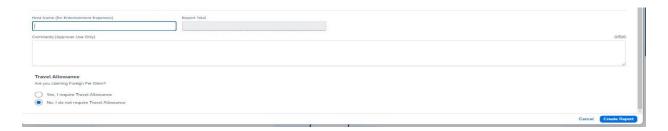
3. Under Policy select "Travel & Entertainment Policy" then Under the Event/Trip Name write down Type of Trip for Example (Summerfield, Earth # Spring Ext). Choose the report type to "Travel in state/ Out state ext. Choose the option on the "Event/ Trip/Purpose". Write down the purpose on the trip. Enter the dates of the trip only. On the "Payee Type" choose your Affiliation with UCSB.



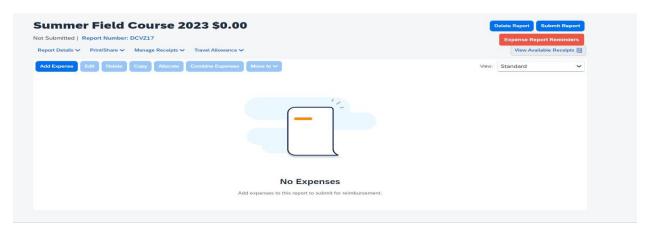
Note: When choosing the department click on either and look for GEOL. After that on the "FAU" click on either and type an "*account number" for faster search make sure the "*" is in front. The cost type leave it blank and the Sub Account click on "3. Supplies and Expense" Please see picture below

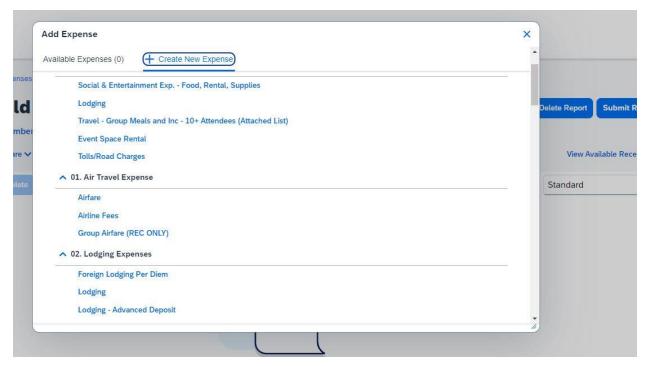


4. Choose the host name if travelled by a group if not Leave it blank. Click save.

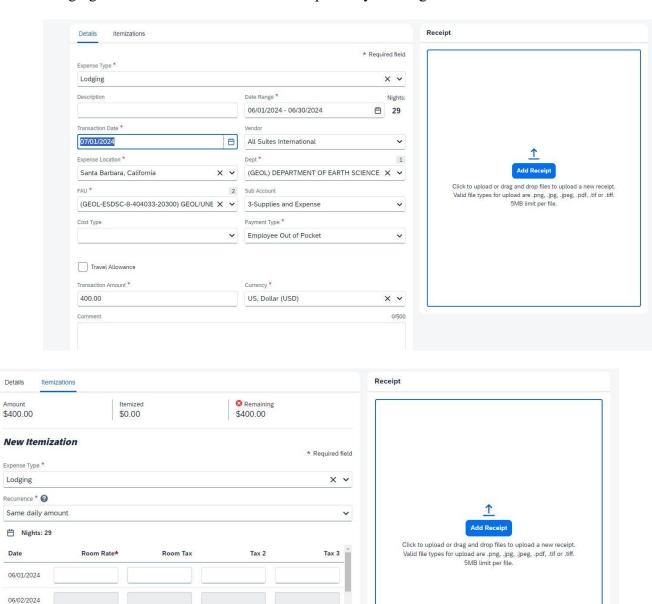


5. Click on Add Expense and choose the appropriate expense.





6. Lodging: You will have to Itemized the expense by clicking "Itemization"



Add Tax Fields

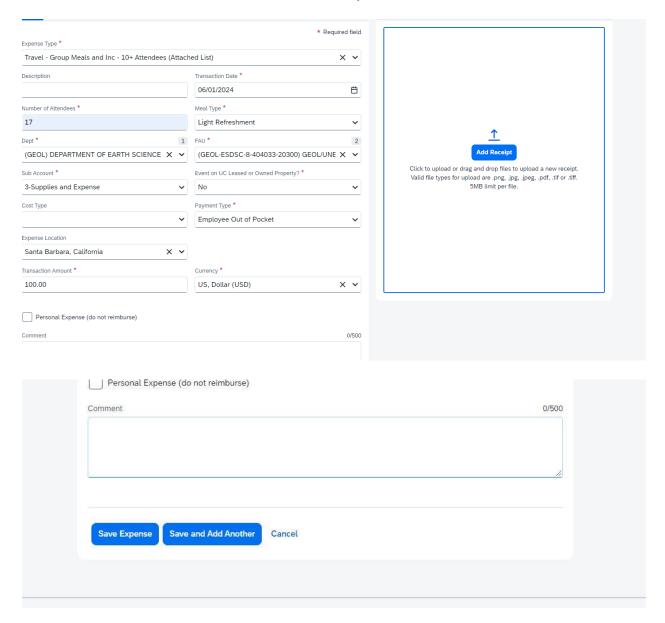
06/03/2024 06/04/2024 06/05/2024

(Amounts in USD)

Travel – Group Meals and Incidentals

Attached a list of the people who attended the trip. For Meals create a new expense for each day.

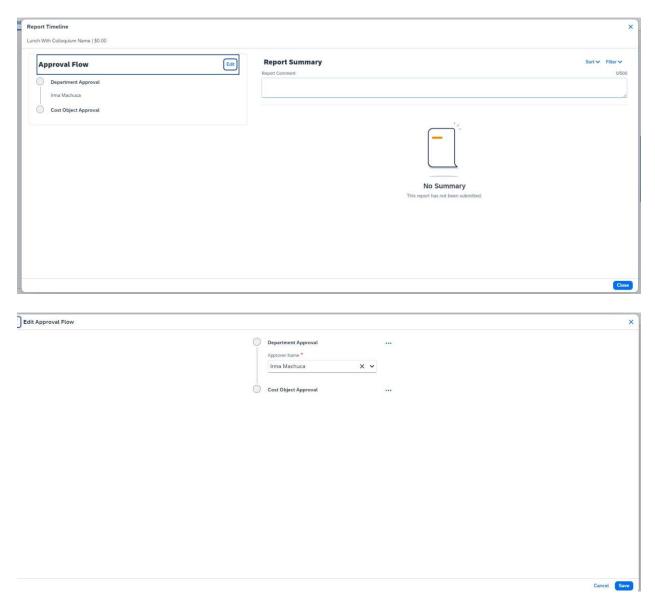
On the bottom click save and add another one, after your done click saved.



For all of the travel expenses it must explain the Lodging, Transportation and Subsistence.

If you are only requesting Transportation and Subsistence then you have to write on the comments who is paying for Lodging. Same goes for transportation and Subsistence.

Check to see if you have the right approval for your department. Click on "Report then on Report Timeline and add the appropriate name for the department.



Click Submit