

# Step-by-Step Guide

## Concur Travel & Entertainment

### Login instructions for Desktop

Use the following link to access the site: [www.concursolutions.com](http://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](https://play.google.com/store/apps/details?id=com.concur.breeze&hl=en_US&gl=US)

**Starting a Request (Prior to traveling)** - Click "New," then "Start a Request" at the top of the screen to create a new Request.

The screenshot displays the SAP Concur mobile application interface. At the top, the header includes the SAP Concur logo, navigation tabs (Requests, Travel, Expense, Approvals, App Center), and a user profile icon. Below the header, a greeting "Hello, Rebecca" is shown. A row of status indicators includes a "New" button (highlighted with a blue plus icon) and four circular icons representing "Required Approvals", "Authorization Requests", "Available Expenses", and "Open Reports". A dropdown menu is open from the "New" button, showing options: "Start a Request", "Start a Report", "Enter New Reservation", and "Upload Receipts". The main content area is divided into sections: "TRIP SEARCH" with a flight search form and COVID-19 information; "ALERTS" with a message about the Regents of the University of California subscription; "COMPANY NOTES" with a link to the Concur Knowledge Base; and "MY TASKS" with three cards for "Required Approvals", "Available Expenses", and "Open Reports", each showing a count of zero and a checkmark icon. The bottom section, "MY TRIPS (0)", indicates no upcoming trips.

Select "Travel & Entertainment" from the Policy menu, then enter an Event/Trip Name- including the type of Travel/Expense and Location (ex AGU Conference in New Orleans, Fieldwork in Fairbanks, etc). The Event/Trip Name is what will be included in GUS as the expense description. Report type and Request/Trip Purpose will be based on the specific requests details. The business purpose should explain why this travel/entertainment was necessary and for what purpose as it relates to the project being charged.

#### Create New Request

Request Policy *	Event/Trip Name *	Report Type *
Travel/Entertainment Request	Fieldwork in Stockton, Dec 2021	Travel in state
Request/Trip Purpose *	Business Purpose *	
General Travel/Expense	To monitor and perform maintenance on the sensors at our field site.	

Enter the Request/Trip Dates and complete any drop downs with a red asterisk.  
Choose the Payee type based on your affiliation with UCSB.

Payee Type \*

None Selected

None Selected

Affiliate

Employee

Student

Visitor

Choose the Department Code- (e.g. GEOG) of where the funding is managed \*Note: This field can be filtered to search by text, code or either. If you are having trouble finding the department, try changing the filter to include "either."

Dept \*

1

▼

Search by Text

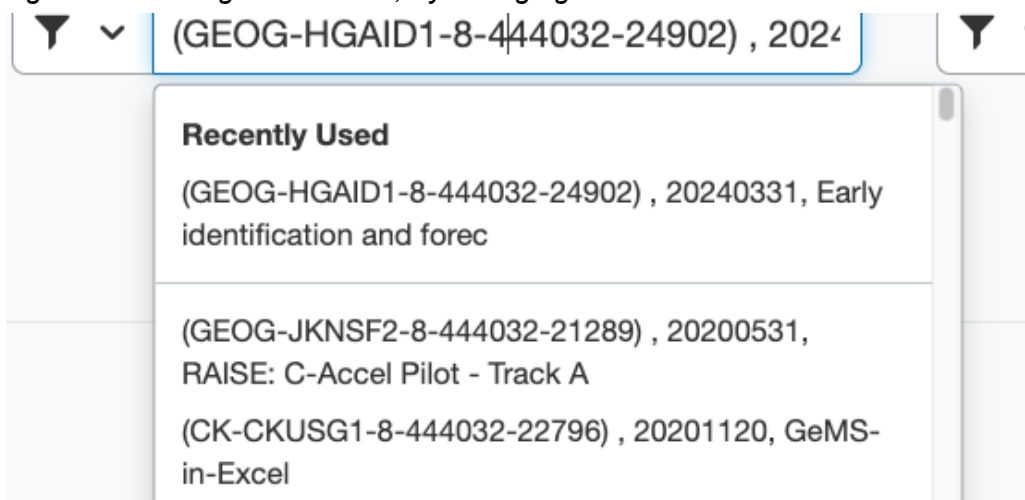
Text

Code

Either

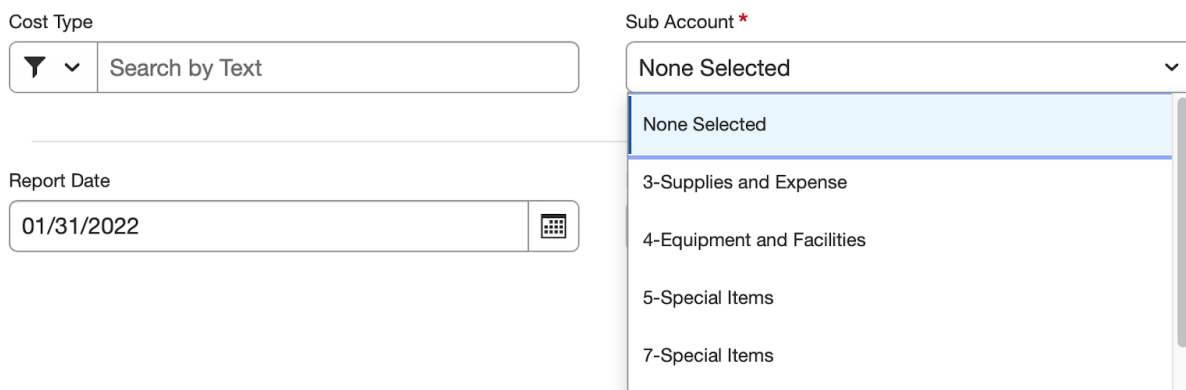
None Selected

The FAU field is where you select the appropriate Project Code/Account. Type your project code and select the account when it loads in the drop down menu. *\*This field can be filtered to search by text, code or either. If you are having trouble finding the account, try changing the filter to include “either.”*



The screenshot shows a dropdown menu for the FAU field. The search bar contains the text "(GEOG-HGAID1-8-444032-24902) , 2024". Below the search bar, under the heading "Recently Used", there are three items listed: "(GEOG-HGAID1-8-444032-24902) , 20240331, Early identification and forec", "(GEOG-JKNSF2-8-444032-21289) , 20200531, RAISE: C-Accel Pilot - Track A", and "(CK-CKUSG1-8-444032-22796) , 20201120, GeMS-in-Excel".

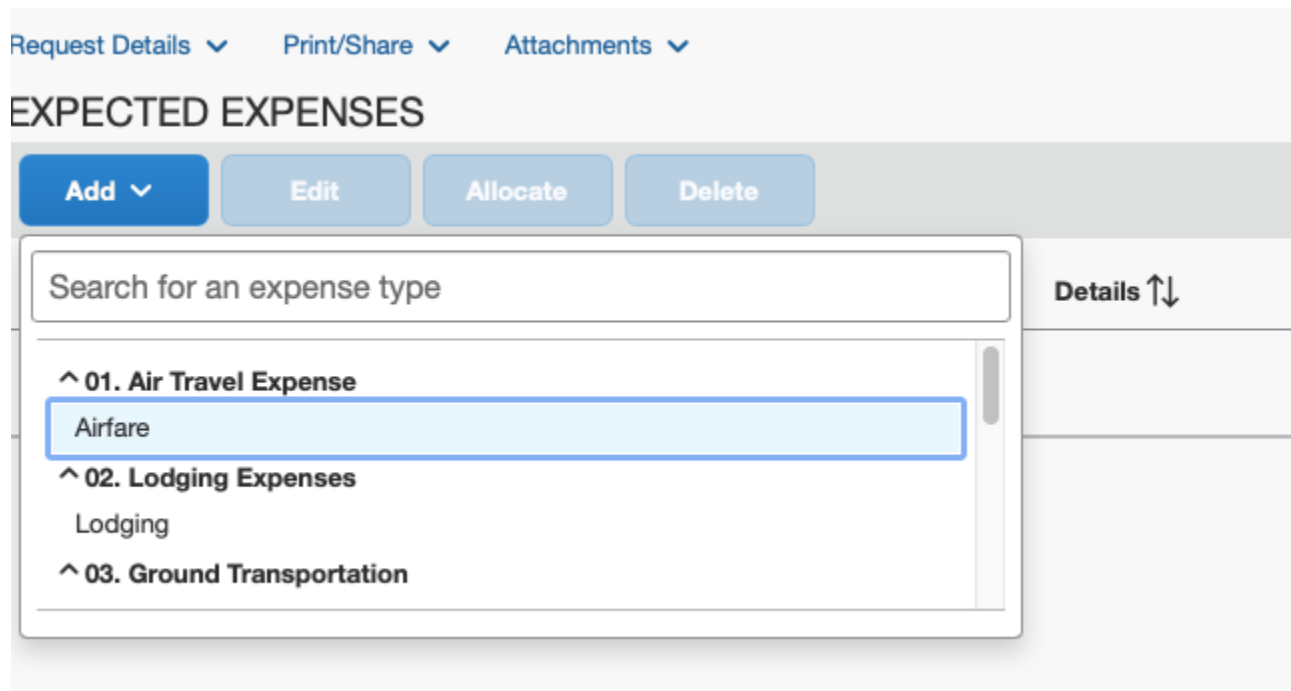
Cost Type/Sub Account- **do not fill in the Cost Type field.** For Sub Account, select 5- Special Items.



The screenshot shows two fields: "Cost Type" and "Sub Account \*". The "Cost Type" field has a dropdown arrow and a search bar with the text "Search by Text". The "Sub Account \*" field has a dropdown arrow and a list of options: "None Selected", "3-Supplies and Expense", "4-Equipment and Facilities", "5-Special Items", and "7-Special Items". The "5-Special Items" option is highlighted.

Enter a Host Name for all entertainment expenses, if applicable.  
Click “Create” at the bottom of the screen when complete.

**Adding Expenses** - Click “Add” and Scroll down to find the appropriate category



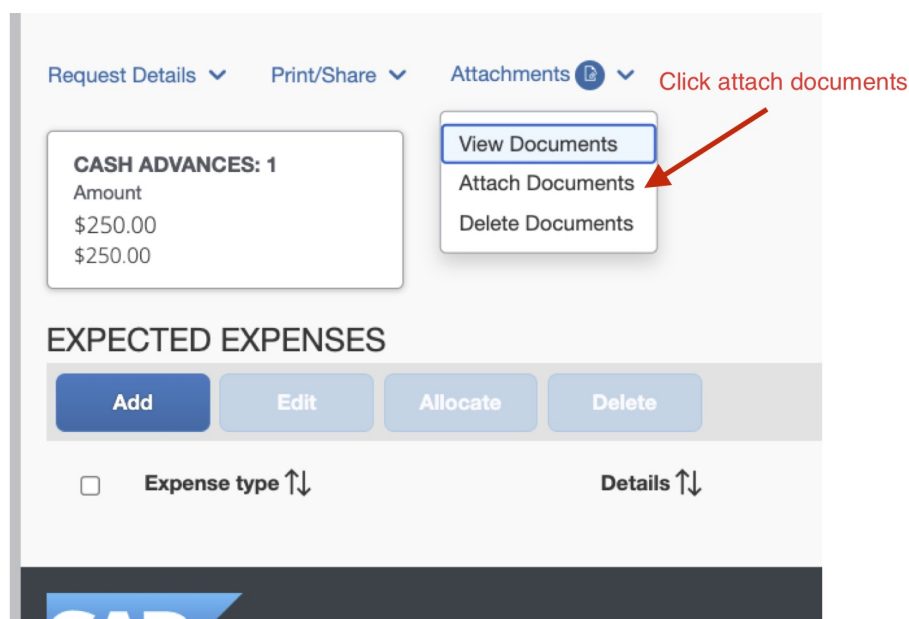
The screenshot shows the "EXPECTED EXPENSES" section. At the top, there are three links: "Request Details", "Print/Share", and "Attachments". Below these links, there are four buttons: "Add", "Edit", "Allocate", and "Delete". The "Add" button is highlighted. Below the buttons, there is a search bar with the text "Search for an expense type". To the right of the search bar, there is a "Details" link with an up/down arrow. Below the search bar, there is a list of expense categories: "01. Air Travel Expense", "02. Lodging Expenses", and "03. Ground Transportation". The "01. Air Travel Expense" category is expanded, showing "Airfare" as a sub-item. The "02. Lodging Expenses" category is also expanded, showing "Lodging" as a sub-item.

Add a description and an expected expense amount, then click save

If requesting a **Cash Advance**, click Request Details > Add Cash Advance and input the total amount that you are requesting. Confirm the currency and click Add Cash Advance.

**BEFORE YOU SUBMIT: PI approval must also be included. If this documentation is not provided, your request will be returned.** There are two options for providing this documentation:

- a. **OPTION 1:** Upload a copy of the approval with the receipt OR as an attachment: this can be an email from the PI, stating that they approve the expense. The email must include a description of the trip including location and dates, total amount, and account/project code to charge.



- b. **OPTION 2:** Add PI to the workflow: Under Report Details → Report Timeline → Edit Approval Flow → Add Step → select user → save. After the PI has been added, you will see them as the next step in the workflow (last screenshot below).

SAP Concur

Requests

Travel

Expense

Approvals

Reporting

App Center

Request Timeline

test | \$0.00

Approval Flow

Edit

Department Approval

Marter, Danica

Funding Approval

Cash Advance/Exception Review

Request Summary

No Summary.

This request has not been submitted

Add Comment

Edit Approval Flow

×

+ Add Step

Department Approval

▼

Marter, Danica

+ Add Step

Funding Approval

+ Add Step

Cash Advance/Exception Review

+ Add Step

Cancel

Save

Edit Approval Flow ✕

[+ Add Step](#)

User-Added Approver

▼  [Delete](#)

[+ Add Step](#)

Department

▼

[+ Add Step](#)

Funding Approval

[+ Add Step](#)

Cash Advance/Exception Review

[+ Add Step](#)

[Cancel](#) [Save](#)

*Search for user and click add step button*

SAP Concur Requests Travel Expense Approvals Reporting App Center

Request Timeline  
test | \$0.00

Approval Flow [Edit](#)

**User-Added Approver**  
Ponce, Nancy J.

**Department Approval**  
Marter, Danica

**Funding Approval**

**Exception Approval**

**Cash Advance/Exception Review**

**Request Summary**

**No Summary.**  
This request has not been submitted

[Add Comment](#)

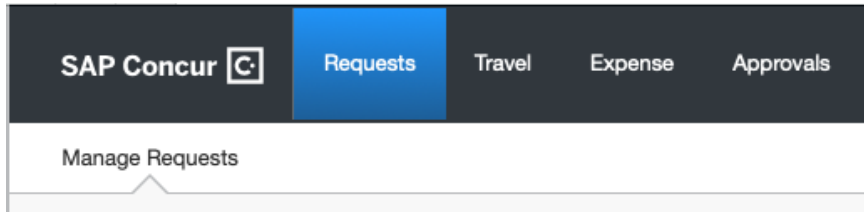
*User has successfully been added to the workflow*

[Service Status \(North America\)](#)  
[Cookie Preferences](#)

Once all expected expenses (and the cash advance if appropriate) have been added, click the red "Submit Request" button in the top right corner.

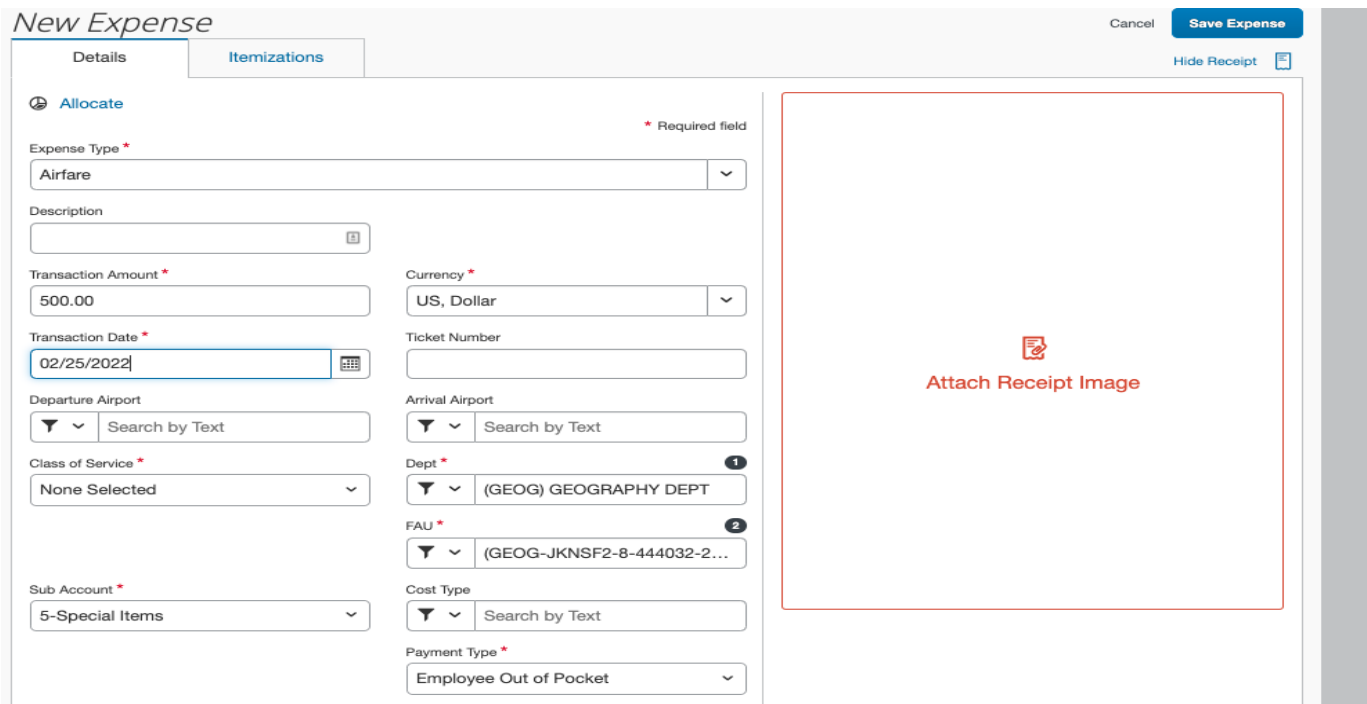
### Starting a Report (after traveling):

1. If a prior approval request was submitted before the trip took place, click “Requests,” from the top menu and then click into the approved request.  
→ From within the approved request, click on the red button “create expense report.” Concur will automatically input all the report header and expenses into a newly created report. If you need to adjust or correct any expenses that may have changed, you may do so by clicking into the expense line items and making changes as needed.



2. If a prior approval request was not submitted before the trip took place, then you can create a new report by clicking the New+ and selecting ‘start a report.’ ” Complete the required fields. Refer to steps 3-9 above for more detail.

Upload your receipt and use it to enter the receipt details in the fields to the left. Dept/FAU/Cost Type and Sub Account will auto-fill from the Report Header. Click “Save Expense” when done.



**New Expense**

Cancel Save Expense

Hide Receipt

**Details** Itemizations

**Allocate**

\* Required field

Expense Type \*  
Airfare

Description

Transaction Amount \*  
500.00

Currency \*  
US, Dollar

Transaction Date \*  
02/25/2022

Ticket Number

Departure Airport  
Search by Text

Arrival Airport  
Search by Text

Class of Service \*  
None Selected

Dept \*  
(GEOG) GEOGRAPHY DEPT

FAU \*  
(GEOG-JKNSF2-8-444032-2...

Sub Account \*  
5-Special Items

Cost Type  
Search by Text

Payment Type \*  
Employee Out of Pocket

Attach Receipt Image

**\*\*If missing receipt for an expense that requires one, note the alert (!). Select the expense (check box) and click “Manage Receipts” > “Missing Receipt Declaration”. A Receipt Declaration will pop-up for your review and acceptance.**

SAP Concur

Requests

Travel

Expense

Approvals

Reporting

App Center

Profile

Manage Expenses

Alerts: 1

HSI Administrator's Conference \$518.54

Copy Report

Submit Report

Not Submitted

Report Details

Print/Share

Manage Receipts

Travel Allowance

Add Expense

Edit

Manage Attachments

Allocate

Combine Expenses

Move to

Missing Receipt Declaration

	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>			Employee Out of Pocket	Personal Car/Business Use - Mileage		02/05/2022	\$131.04 Allocated
<input checked="" type="checkbox"/>			Employee Out of Pocket	Taxi/Shuttle/Car Service	Oakland, California	02/04/2022	\$100.00
<input type="checkbox"/>			Employee Out of Pocket	*Travel - Meals & Incidentals	Oakland, California	02/04/2022	\$12.50
<input type="checkbox"/>			Employee Out of Pocket	Airfare	American Airlines Santa Barbara, California	02/03/2022	\$275.00
							\$518.54

Create Receipt Declaration

Adequate documentation must be submitted to substantiate reimbursable The University of California Santa Barbara expenses in accordance with IRS rules & regulations. Original receipts must be submitted when available and are considered acceptable support for The University of California Santa Barbara expenses. When the original receipt has been lost or is otherwise not available from the vendor, the following documentary evidence must be submitted before expenses will be considered for reimbursement.

To create a Missing Receipt Declaration, select the expense(s) below that require a receipt.

<input checked="" type="checkbox"/>	Expense Type	Vendor	Date	Amount
<input checked="" type="checkbox"/>	Taxi/Shuttle/Car Service		02/04/2022	\$100.00

I acknowledge that this expense report contains legitimate College expenses incurred by me on behalf of The University of California Santa Barbara benefit, and are allowable expenses as defined by The University of California Santa Barbara Policy. I further certify that one or more of the related receipts applicable to this expense report are no longer available.

Cancel

Accept & Create



Continue to add expenses for each additional expense that requires a receipt. System will give you a red alert if information is missing and/or incomplete.

AGU Conference \$1,650.00

Copy Report

Submit Report

Not Submitted

Report Details

Print/Share

Manage Receipts

Travel Allowance

Add Expense

Edit

Delete

Copy

Allocate

Combine Expenses

Move to

<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>			Employee Out of Pocket	Seminar/Conference Registration	New Orleans, Louisiana	02/18/2022	\$650.00
<input type="checkbox"/>			Employee Out of Pocket	Airfare	American Airlines New Orleans, Louisiana	01/06/2022	\$500.00
<input type="checkbox"/>			Employee Out of Pocket	Lodging	New Orleans, Louisiana	01/06/2022	\$500.00
							\$1,650.00

**Splitting the Funding Across Multiple Projects/Accounts - Allocation** - If you need to split the expenses across multiple accounts, click the checkbox beside all expense lines being split-funded and click “Allocate.” The allocation screen will display the current allocation as 100% on the account you listed in the initial Expense Report setup (account will not be visible on this screen, only the allocation percent). If allocating by percent, e.g. 50% of the expense will be charged to a different project code, click “Add.” If allocating by dollar amount, e.g. \$20 will be charged to a different project code, click “Amount,” then “Add.”

Allocate

Expenses: 1 | \$25.50

Percent

Amount

Amount  
\$25.50

Allocated \$25.50  
100%

Remaining \$0.00  
0%

Default Allocation

Code  
GEOG-LM-ICRGD2-8-404032-05397-3

Percent %  
100

Add

Edit

Remove

Save as Favorite

No Allocations

This expense is assigned to your default allocation shown above. Click the allocate button to allocate part or all of this expense differently.

Enter the new Dept, FAU and Sub Account (**do not enter Cost Type**) and click “Save.” *\*Note: These fields can be filtered to search by text, code or either. If you are having trouble finding the Dept or FAU, try changing the filter to include “either.”*

Enter either the percentage or amount being charged to the newly added account, then click “Save.” *Note- if allocating by dollar value, you will need to click on “Amount” before entering the amount being charged to the new account.* If splitting across more than two accounts, continue to add allocations until 100% of the total expense is allocated across all relevant accounts.

Dept	FAU	Cost Type	Sub Account	Code	Percent
GEOGRAPHY DEPT	, 20201120, GeMS-in-Excel		5-Special Items	GEOG-CK-CKUSG1-8-444032-22796-5	50

To check the allocations, click the “Allocated” link under each expense and the funding split will be displayed. This information can also be found in the Report Details drop down menu above the Add Expense button.

Edit




Delete

Copy

Allocate

Combine Expenses

Move to

Receipt	Payment Type	Expense Type	Vendor Details	Date
	Employee Out of Pocket	Seminar/Conference Registration	New Orleans, Louisiana	02/18/2022
	Employee Out of Pocket	Airfare	<div><div>Allocated</div><div>Total Allocated</div><div>\$650.00</div><div>Code</div><div>GEOG-CK-CKUSG1-8-444032-22796-5</div><div>GEOG-GEOG-JKNSF2-8-444032-21289-5</div><div>View Allocation</div></div>	
	Employee Out of Pocket	Lodging		

**BEFORE YOU SUBMIT - Check your Department Expense Approver (DEA) -** Click on the “Report Details” dropdown menu and select “Report Timeline.” If submitting an expense report to be paid for by accounts managed by GEOG, you need to make sure your DEA, or Department Approver, is included in the workflow. If needed, click “Edit” next to Approval Flow and change the Department Approval to reflect the correct Dept Approver or DEA.

Report Timeline

AGU Conference | \$1,650.00

Approval Flow Edit

○ Department Approval  
Marter, Danica

○ Cost Object Approval

○ Central Office Approval

Report Summary

No Summary.

This report has not been submitted.

Add Comment

Report Timeline

AGU Conference | \$1,650.00

Approval Flow Edit

○ Department Approval  
Marter, Danica

○ Cost Object Approval

○ Central Office Approval

+ Add Step

Department Approval

▼ ▼

Marter, Danica

Last Name

First Name

Email Address

Login ID

Employee ID

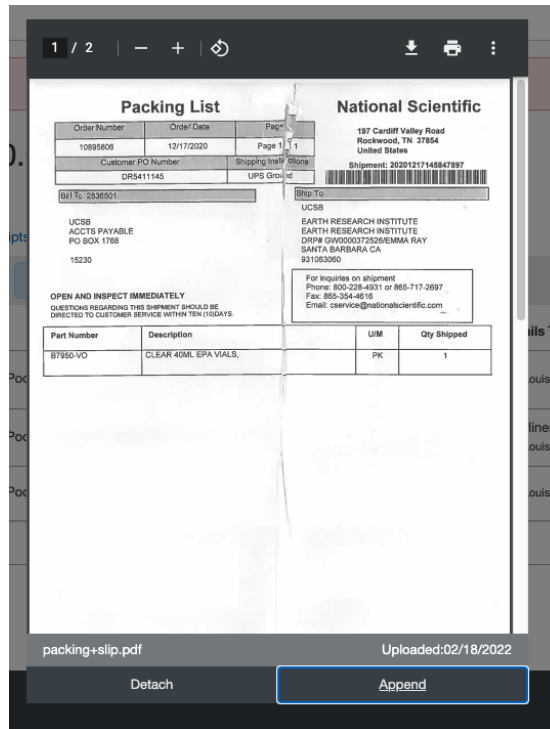
Central Office Approval

Cancel

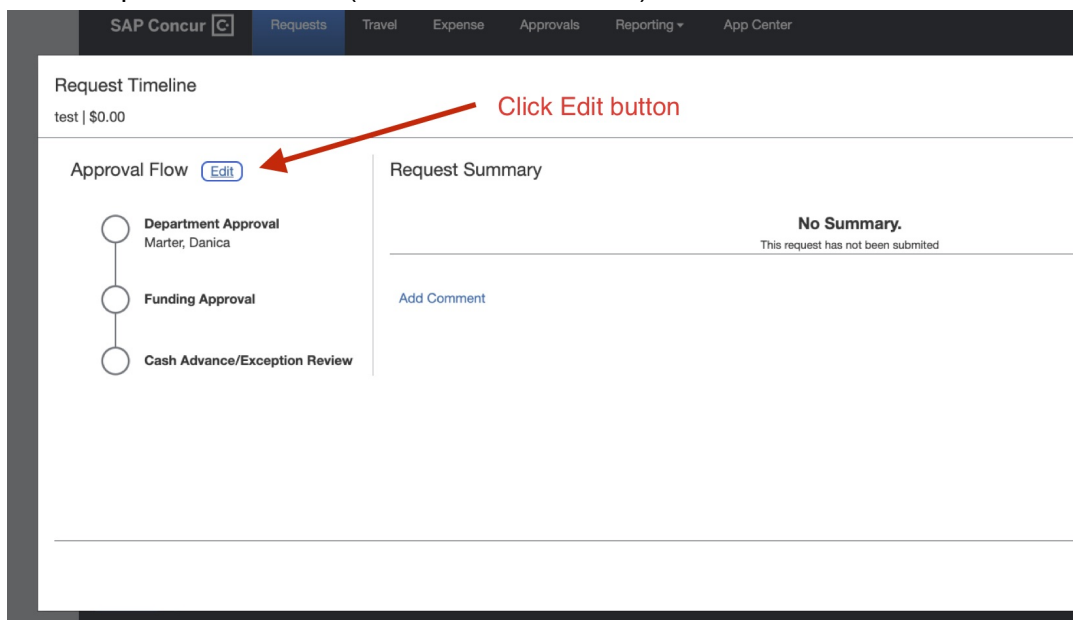
Save

**BEFORE YOU SUBMIT: PI approval must also be included. If this documentation is not provided, your request will be returned.** There are two options for providing this documentation:

**OPTION 1: Upload a copy of the approval with an expense receipt:** this can be an email from the PI, stating that they approve the expense. The email must include a description of the trip including location and dates, total amount, and account/project code to charge.  
→ if you already uploaded a receipt, you have the option to edit the receipt:



**OPTION 2: Add PI to the workflow:** Under Report Details → Report Timeline → Edit Approval Flow → Add Step → select user → save. After the PI has been added, you will see them as the next step in the workflow (last screenshot below).



## Edit Approval Flow

Click add step button



+ Add Step

### Department Approval

▼ Marter, Danica

+ Add Step

### Funding Approval

+ Add Step

### Cash Advance/Exception Review

+ Add Step

Cancel

Save

## Edit Approval Flow



+ Add Step

Search for user and click add step button

### User-Added Approver

▼ ponce Delete

+ Add Step

Ponce, Nancy J. (nancy@geog.ucsb.edu)  
User ID: 10073778 Logon ID: njpon@ucsb.edu

### Department

▼ Marter, Danica

+ Add Step

### Funding Approval

+ Add Step

### Cash Advance/Exception Review

+ Add Step

Cancel

Save

SAP Concur

RequestsTravelExpenseApprovalsReportingApp Center

Request Timeline

test | \$0.00

Approval Flow

Edit

User-Added Approver

Ponce, Nancy J.

Department Approval

Marter, Danica

Funding Approval

Exception Approval

Cash Advance/Exception Review

Request Summary

No Summary.

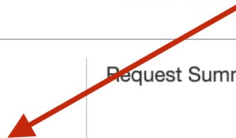
This request has not been submitted

Add Comment

Service Status (North America)

Cookie Preferences

User has successfully been added to the workflow



## Support Resources

- **Email Support:** Please email [concur@bfs.ucsb.edu](mailto:concur@bfs.ucsb.edu) if you have any issues logging into Concur, or with creating or submitting a Request/Expense Report.
  - *Important: Please do not email BFS processors directly for Concur support. Instead, contact [purchasing@geog.ucsb.edu](mailto:purchasing@geog.ucsb.edu) and we will do our best to assist you.*
  - **Office Hours:** BFS is offering office hours with Concur subject matter experts.
  - Check availability and book your 15 minute appointment here:  
[Concur appointment calendar](#)
  - Please only use appointment slots if you are actively working on a request/expense report. For less urgent support, please email [concur@bfs.ucsb.edu](mailto:concur@bfs.ucsb.edu).
- **Knowledge Base Articles:** A set of key articles can be found at the links below:
  - [Getting Started with Concur](#)
  - [How to Create and Submit a Request](#)
  - [How to Create an Expense Report from an Approved Request](#)
  - [How to Add a Delegate](#)
  - [How to Use the Mobile App to Upload Receipts](#)