UC **SANTA BARBARA**

Training Overview: Concur Reimbursements

Login to Concur [here](#)	
### Step-by-Step Guides* Travel & Entertainment Business Expenses (available on GEOG [website](#))	### 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)

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.

Approvers
- [How to Add an Ad Hoc Approver](#) (1:31 min)
- [Concur Approvers Guide](#)