

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&q=US

2. **Starting an Expense Report** - Click "New," then "Start a Report" at the top of the screen to create a new Expense Report.

The screenshot displays the SAP Concur user interface for a user named UC SANTA BARBARA. At the top, there are five navigation buttons: "Start a Request", "Start a Report", "Authorization Requests", "Available Expenses", and "Open Reports". Below this is a "Company Notes" section with a message about the Concur Knowledge Base and a "Read More" link. The "Tasks" section shows three status cards: "Open Requests" (00), "Available Expenses" (00), and "Open Reports" (00). Each card indicates that the user currently has no active requests, no available expenses, or no open reports, respectively, and each card features a checkmark icon.

- 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

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

Host Name (for Entertainment Expenses) Report Total

Comments (Approver Use Only)

Travel Allowance
Are you claiming Foreign Per Diem?
 Yes, I require Travel Allowance
 No, I do not require Travel Allowance

Cancel [Create Report](#)

- Click on Add Expense and choose the appropriate expense.

Summer Field Course 2023 \$0.00
Not Submitted | Report Number: DCV217

[Delete Report](#) [Submit Report](#)
[Expense Report Reminders](#)
[View Available Receipts](#)

Report Details | [Print/Share](#) | [Manage Receipts](#) | [Travel Allowance](#)

[Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move to](#)

View: Standard

No Expenses
Add expenses to this report to submit for reimbursement.

Add Expense

Available Expenses (0) [+ Create New Expense](#)

- Social & Entertainment Exp. - Food, Rental, Supplies
- Lodging
- Travel - Group Meals and Inc - 10+ Attendees (Attached List)
- Event Space Rental
- Tolls/Road Charges
- 01. Air Travel Expense
 - Airfare
 - Airline Fees
 - Group Airfare (REC ONLY)
- 02. Lodging Expenses
 - Foreign Lodging Per Diem
 - Lodging
 - Lodging - Advanced Deposit

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

Details Itemizations

* Required field

Expense Type *
Lodging

Description _____ Date Range * 06/01/2024 - 06/30/2024 Nights: 29

Transaction Date * 07/01/2024 Vendor All Suites International

Expense Location * Santa Barbara, California Dept * (GEOL) DEPARTMENT OF EARTH SCIENCE

FAU * (GEOL-ESDSC-8-404033-20300) GEOL/UNE Sub Account 3-Supplies and Expense


Cost Type _____ Payment Type * Employee Out of Pocket

Travel Allowance

Transaction Amount * 400.00 Currency * US, Dollar (USD)

Comment _____ 0/500

Receipt



Add Receipt

Click to upload or drag and drop files to upload a new receipt.
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.
5MB limit per file.

Details **Itemizations**

Amount \$400.00	Itemized \$0.00	Remaining \$400.00
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New Itemization

* Required field

Expense Type *
Lodging


Recurrence * Same daily amount

Nights: 29

Date	Room Rate*	Room Tax	Tax 2	Tax 3
06/01/2024				
06/02/2024				
06/03/2024				
06/04/2024				
06/05/2024				
06/06/2024				

(Amounts in USD) Add Tax Fields

Receipt



Add Receipt

Click to upload or drag and drop files to upload a new receipt.
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.
5MB limit per file.

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.

* Required field

Expense Type *
Travel - Group Meals and Inc - 10+ Attendees (Attached List) X v

Description Transaction Date *
06/01/2024 🗓

Number of Attendees *
17 Meal Type *
Light Refreshment v

Dept * 1 FAU * 2
(GEOL) DEPARTMENT OF EARTH SCIENCE X v (GEOL-ESDSC-8-404033-20300) GEOL/UNE X v

Sub Account *
3-Supplies and Expense v Event on UC Leased or Owned Property? *
No v


Cost Type v Payment Type *
Employee Out of Pocket v

Expense Location
Santa Barbara, California X v

Transaction Amount *
100.00 Currency *
US, Dollar (USD) X v

Personal Expense (do not reimburse)

Comment 0/500


Click to upload or drag and drop files to upload a new receipt.
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.
5MB limit per file.

Personal Expense (do not reimburse)

Comment 0/500

Save Expense Save and Add Another Cancel

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.

The screenshot shows a window titled "Report Timeline" with a subtitle "Lunch With Colloquium Name | \$0.00". It is divided into two main sections: "Approval Flow" and "Report Summary".

- Approval Flow:** A vertical list of two items: "Department Approval" and "Cost Object Approval". The "Department Approval" item is selected and has a dropdown menu showing "Irma Machuca". An "Edit" button is located to the right of the list.
- Report Summary:** A section with a "Report Comment" text area and a character count of "0/500". Below this is a "No Summary" message with a document icon and the text "This report has not been submitted." There are "Sort" and "Filter" dropdowns in the top right of this section.

A "Close" button is located at the bottom right of the window.

The screenshot shows a window titled "Edit Approval Flow". It displays a vertical list of two items: "Department Approval" and "Cost Object Approval".

- Department Approval:** This item is selected and has a dropdown menu open, showing "Irma Machuca" with a search icon and a close button. There are three dots to the right of this item.
- Cost Object Approval:** This item is not selected and has three dots to its right.

"Cancel" and "Save" buttons are located at the bottom right of the window.

Click Submit