***Travel, Entertainment & Business Expense Requests & Resources***

**Quick overview of Concur**

[Concur Overview](https://ucsb.service-now.com/kb?id=kb_article_view&sys_kb_id=88aa94bb1b1481d0e9250f22604bcbcb) Video (3:06 min)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

**Prior to Travel/Event: Submit a Request (Pre-Authorization for travel or entertainment)**

* [How to Create and Submit a Request](https://ucsb.service-now.com/kb?id=kb_article_view&sys_kb_id=b0a716551bf3745047e8ed34604bcb4b) Video (1:56 min)
  + Refer to the Understanding the Header Row video [Understanding a Concur Header](https://ucsb.service-now.com/kb?id=kb_article_view&sys_kb_id=29d43a971bbf3810e9250f22604bcb98) Video (1:19 min). Here are examples of fields you will need to fill out. Same as the paper form.
    - Event/Trip Name (e.g., conference, training, fieldwork)
    - Report Type (Dropdown options)
    - Request/Trip purpose & Business purpose
    - Request/Trip start and Request/Trip end dates
    - Destination City/Country
    - Host Name (For entertainment or employee morale events)
  + **Expected Expense Screen:** We recommend adding in anticipated expenses such as lodging, meals, or registration. This step will save you time when you return from your trip.
* [How to Request a Cash Advance](https://ucsb.service-now.com/kb?id=kb_article_view&sys_kb_id=0d41a7dd1b3f745047e8ed34604bcb57) Video (0.33 min)
* [How to Apply a Cash Advance](https://ucsb.service-now.com/kb?id=kb_article_view&sys_kb_id=7bc82fb41bc40150e9250f22604bcb87) Video (0.54 min)
  + It’s recommended for travelers to apply for a Travel & Entertainment Card.

**Returning from Travel: Create an Expense Report (Travel, Entertainment, or Business)**

[How to Create an Expense Report from an Approved Request](https://ucsb.service-now.com/kb?id=kb_article_view&sys_kb_id=5e8fb6b41bc00150e9250f22604bcb93) Video (1:33 min)

* + FAU (Full Accounting Unit)- This is the account you will spend money from (e.g., start-up, retention, grant). Make sure to enter the correct four-letter department code.
  + Selecting the correct Funding Sub.
    - For Travel- Select sub-5
    - For most other reimbursements- Select sub-3
* [How to Create an Expense Report on Concur Mobile](https://ucsb.service-now.com/kb?id=kb_article_view&sysparm_article=KB0011374) (No video)
* [How to Itemize an Expense on Concur Mobile](https://ucsb.service-now.com/kb?id=kb_article_view&sysparm_article=KB0011375) (No video)
* [Uploading Receipts](https://ucsb.service-now.com/kb?id=kb_article_view&sys_kb_id=6403bf2f1b1081d0e9250f22604bcb99) Video (1:15 min)
* [Uploading Receipts on Concur Mobile](https://ucsb.service-now.com/kb?id=kb_article_view&sys_kb_id=b09f5a541b4d451447e8ed34604bcbdc) Video (1:19 min)
  + Pro Tip: Upload your receipts into Concur before starting your expense report.
  + Follow your department’s protocol on submitting meal receipts.

**Business Expense: (e.g., memberships, miscellaneous expenses)**

* [How to create a Business Expense Report](https://ucsb.service-now.com/kb?id=kb_article_view&sys_kb_id=d3d74f461b994910e9250f22604bcb8b)
  + The Business Expense cannot create 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 (Please follow your internal department protocol on using delegates)**

* [Delegate Overview](https://ucsb.service-now.com/kb?id=kb_article_view&sys_kb_id=a8df60ba1b348554e9250f22604bcba3) Video (1.34 min)
* [How to Add a Delegate](https://ucsb.service-now.com/kb?id=kb_article_view&sys_kb_id=77e41e981b2085d0e9250f22604bcb2c) (No video)
  + - If you do not see the employee you want to add as a delegate, please contact your department manager.