



Concur Student User Guide

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Key Terms

- a. **Concur** - Concur is the University’s travel and reimbursement system for employees and students. It is used for 1) prior approval of out-of-state and international travel, 2) booking travel, 3) requesting cash advances, 4) requesting credit cards (for employees only), and 5) accounting for expenses and reimbursement requests.
- b. **Profile** - A Concur profile is where your home and other key information is stored. Your profile must be updated before booking travel, creating a travel request, or creating a travel expense report.
- c. **Travel Request** - An approved travel request is supervisory and financial permission to travel and/or accrue expenses. [University policy](#) requires an approved travel request before travel begins for all out-of-state and international travel.
- d. **Travel Expense Report** - A travel expense report is filed within 30 days of your travel/event ending that includes all correlating expenses and applicable credits. This report should be filed when a cash advance is issued, you have corporate credit card transactions, or expenses were incurred out of your pocket that you need to be reimbursed for.
- e. **Cash Advance** - A cash advance is an option when a University corporate credit card is not available. Funds are issued two weeks prior to your travel/event.
- f. **Delegate** - A delegate is someone who acts on your behalf.
- g. **Chart-Field** - The accounting codes to which all expenses will be charged.

Verify and Request Access to Concur



To verify that your Concur account is active, log into your MyCampus Portal (<http://my.usm.maine.edu>) and select the Concur icon (pictured left) in the LaunchPad. If you do not have this icon but believe you have a Concur account, contact **USM’s Help Desk at 207-780-4029**.

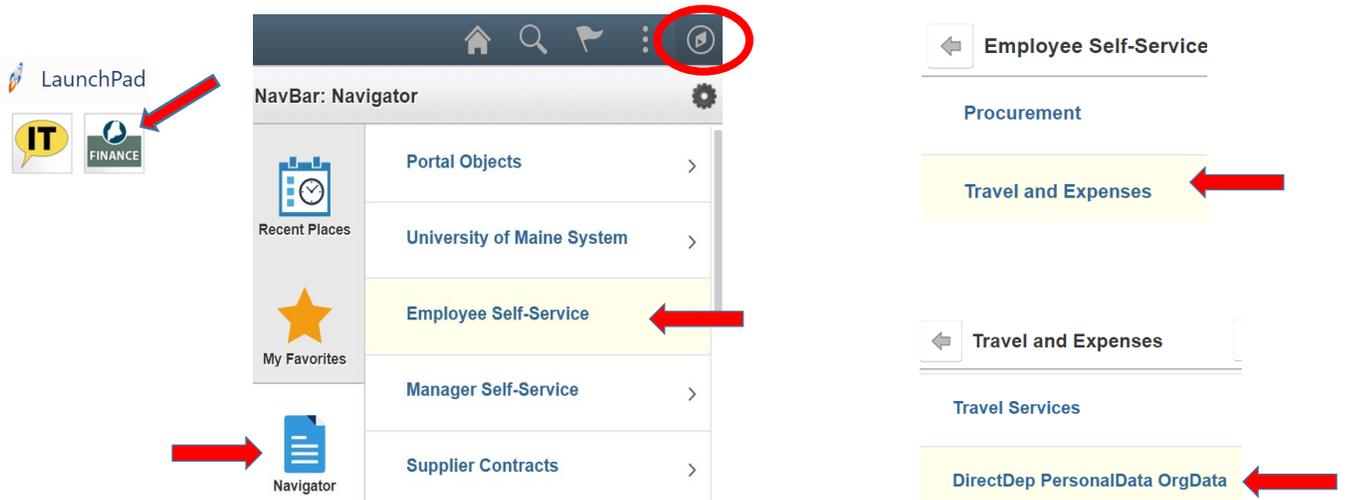
To request a Concur account, complete the online [Concur Profile Request Form](#) on Strategic Procurement’s website: (*MyCampus Portal LaunchPad > UMS Quick Links > Strategic Procurement > Forms, Policies, and Service Contracts > Concur Forms*).

Payment Options (Cash Advance and Reimbursement)

Students need to set up their Travel and Expense profile to ensure payments (cash advances and reimbursements) are sent to the correct location. Payments are issued via check or direct deposit. When approved, payments are issued in accordance with the Accounts Payable Check Run. [Click here](#) for the most current payment schedule.

NOTE: These types of Concur payments are not tied to University payroll. Student employees who have set up direct deposit for payroll, still need to set up direct deposit for Concur payments.

- From your MyCampus Portal LaunchPad, select **Finance**. From the **NavBar** select **Navigator** (compass icon in upper right-hand corner) then select **Employee Self-Service**. Select **Travel and Expenses**, then select **DirectDep Personal Data OrgData**.



- Select the **Personal Data** tab. Verify and/or update your **Employee Information, Home Address, and Mailing Address**. Select **Save** once complete.



→ **Home Address**

Country United States

Address 1

→ **Mailing Address**

Country United States

Address 1

→

[Direct Deposit](#) | [Personal Data](#) | [Organizational Data](#)

a) Check

Checks are the default payment method. If you wish to receive check payments, make sure the direct deposit section is blank and **Save** any changes.

Travel & Expense Direct Deposit

b) Direct Deposit

Students who wish to receive payments via direct deposit:

1. Select the **Direct Deposit** tab, add your bank information in the appropriate boxes, and **Save** all changes.

Travel & Expense Direct Deposit

Payment Method

*Bank Account Type

Routing Number

Account Number

Concur Login and Profile Updates



To log into Concur, log into your MyCampus Portal LaunchPad and select the Concur icon (pictured left). Your first action will be to update your profile.

1. Select **Profile** in the upper right corner of your screen, then select **Profile Settings**.

SAP Concur

Requests Travel Expense Approvals Reporting

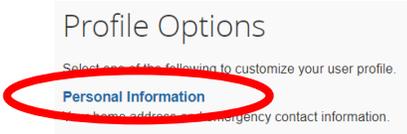
Profile

+ 0 Req Appri

Melissa McPherson

[Profile Settings](#) Sign Out

- 2. Under **Profile Options** select **Personal Information**.



- 3. Review **Legal Name for Airport Security**: Verify that your name is correct, including your middle name and suffix. This information must match your government-issued photo ID (driver’s license or passport).

If any information is incorrect, contact the Travel Administrator at procurementservices@maine.edu.

 A screenshot of a form titled "Legal Name for Airport Security". It contains several input fields: "Title" (dropdown), "First Name" (text, containing "Melissa"), "Middle Name [Required]" (text, containing "L"), "Preferred Name" (text), "Last Name" (text, containing "McPherson"), and "Suffix" (dropdown). There is also a checkbox labeled "No Middle Name" which is unchecked. The entire form is enclosed in a red rectangular border.

- 4. Review **Company Information**: Verify your Employee/Student ID is correct. Select **Student** in the **University Classification** field and select your appropriate campus in the **Affiliated Campus** field.

 A screenshot of a form titled "Company Information" with a "Go to top" link. The form includes fields for "Employee ID" (redacted), "Manager", "Employee Position/Title" (containing "Procurement Coordin..."), "University Classification [Required]" (dropdown, containing "Student"), and "Affiliated Campus [Required]" (dropdown, containing "University of Maine System"). Both the "University Classification" and "Affiliated Campus" dropdowns are circled in red.

- 5. Review **Work Address**: Verify and/or edit your work address. *Note: This should be your campus/department address.*

 A screenshot of a form titled "Work Address" with a "Go to top" link. It includes a red instruction: "When entering your State please do NOT spell out the name - use the two letter state code, i.e. CA, not California, ND, not North Dakota etc...". Below this are fields for "Company Name" (containing "University of Maine System"), "Assigned Location" (dropdown, containing "University of Southern Maine (Portland, ME)"), "Street" (text, containing "5761 KEYO BUILDING"), and a checkbox for "Address same as assigned location". The form is enclosed in a red rectangular border.

- 6. Review **Home Address**: Verify and/or edit your home address. *Note: This should be your home address to which you want to receive University related correspondence and payments. Please do not use a campus address.*

 A screenshot of a form titled "Home Address" with a "Go to top" link. It includes a red instruction: "Please make sure your state is abbreviated and not spelled out using the two letter state code only. IE ME vs Maine. in addition do not use special characters such as #,./ in the address, as this will cause errors when attempting to make travel reservations." Below this are fields for "Street" (text, containing "4 Main Street"), "City" (text, containing "Portland"), "State/Province" (text, containing "ME"), "Postal Code" (text, containing "04101"), and "Country/Region" (dropdown, containing "United States of America"). The form is enclosed in a red rectangular border.

- 7. Review **Contact Information**: Complete the Work Phone, Home Phone, and Mobile Phone fields. If you only have one phone number, enter that number in all three fields.

Contact Information

When entering phone information please do NOT enter special characters - run the number together, i.e. 0001112222.

Work Phone[Required**] 2077805207	Work Extension	Work Fax	2nd Work Phone/Remote Office
Home Phone[Required**] 2071234567			
Pager	Other Phone		
Mobile Phone Country/Region United States of America (+1)	Mobile Phone[Required**] 2071234567		

- 8. Review **Email Address**: Verify your maine.edu email address is correct. Note: If your email is incorrect, contact the Travel Administrator at procurementservices@maine.edu.
 - a. Select the **Verify** link.

Email Addresses

Please add at least one email address.

- [How do I add an email address?](#)
- [How do I verify my email address?](#)
- [Why should I verify my email address?](#)
- [Travel Arrangers / Delegates](#)

Email Address	Verify
Email 1 melissa.mcpherson@maine.edu	Not Verified Verify

- b. Select **OK** on the **Verification Email Sent** notification.

Verification Email Sent

 An email has been sent to this email address. Copy the Verification Code from the email and paste it into the "Enter Code" box below.

[OK](#)

- c. When you receive your email code, enter the code in the **Enter Code** field and select **OK**.

Email Addresses [Go to top](#)

Please add at least one email address.

- [How do I add an email address?](#)
- [Travel Arrangers / Delegates](#)
- [Why should I verify my email address?](#)
- [How do I verify my email address?](#)

[+ Add an email address](#)

Email Address	Verify	Contact?	Actions
Email 1 melissa.l.campbell@maine.edu	Check email for code Cancel	Yes	

Enter Code [OK](#)

9. Review **Emergency Contact**: If applicable, add an emergency contact name and their contact information.

Emergency Contact Go to top

When entering your Emergency Contact you must enter First Name, Last Name, Phone Number. When entering phone information please do NOT enter special characters - run the number together, i.e. 0001112222. When entering an address your State please do NOT spell out the name - use the two letter state code, i.e. CA, not California, ND, not North Dakota etc...

Name: Michael McPherson Relationship: Spouse

Street: 4 Main Street Address same as employee

City: Portland State/Province: ME Postal Code: 04101

Country/Region: United States of America Phone: 2071234567 Alternate Phone:

10. Review **Travel Preferences**: Complete travel preferences as appropriate. In the **TSA Secure Flight** section, select your gender and enter your date of birth. Select **Save** at the bottom of this section to save all changes made in your profile.

Gender [Required] Male Female **Date of Birth (mm/dd/yyyy)[Required]** **DHS Redress No.** **TSA Pre✓ Known Traveler Number**

International Travel: Passports and Visas Go to top

Adding your passport information to your profile will allow us to include it in your reservations. Having this information in your reservation can make international travel a little easier.

Passports + Add a Passport

I do not have a passport

International Visas + Add a Visa

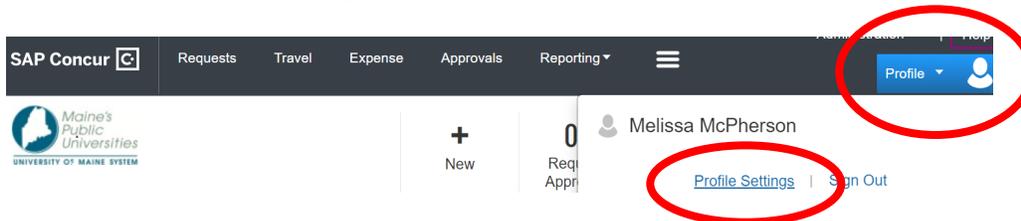
Save

Delegates

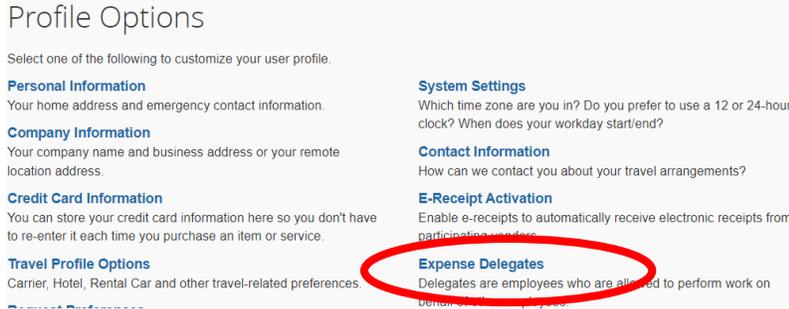
Students have the option to assign a delegate who works in Concur on their behalf. *Note: This does not apply to updating your profile.* Delegates can be added, edited, and removed anytime.

a) Assigning Delegates

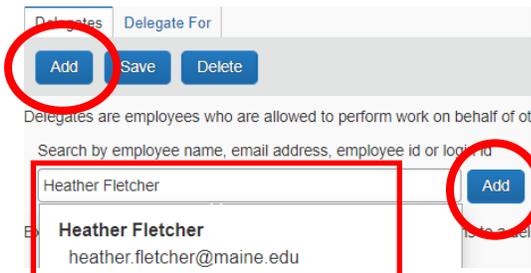
1. Select **Profile** in the upper right corner of your screen, then select **Profile Settings**.



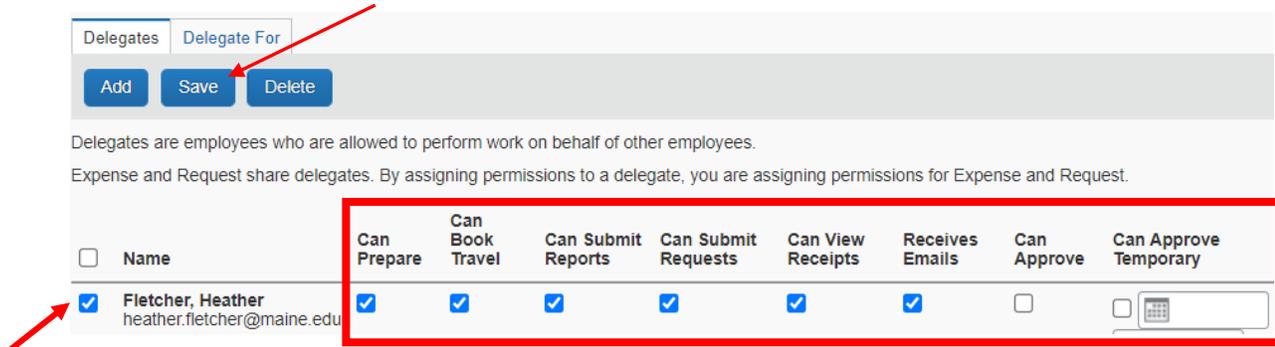
2. Under **Profile Options** select **Expense Delegates**.



3. Select **Add**. In the search field, enter and select the appropriate delegate's name, then select **Add**.

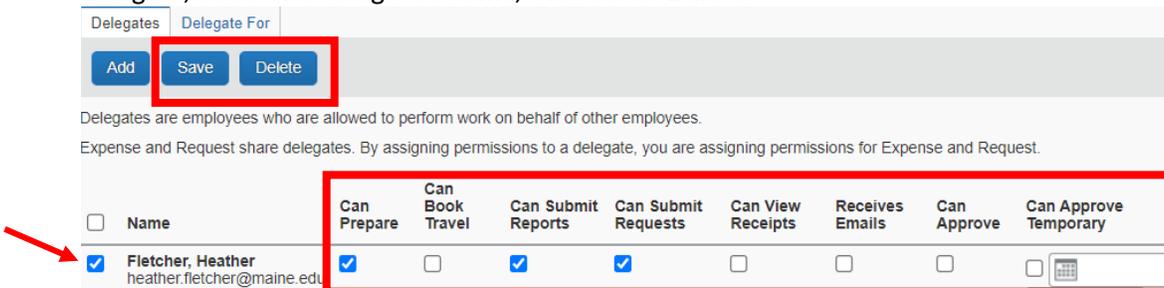


4. Select the checkbox next to the delegate's name, select all appropriate permissions for your delegate, then select **Save**.



b) Editing and Removing Delegates

1. To access your delegates, follow the Assigning Delegates steps 1 and 2.
2. Select the delegate's name. Make appropriate changes to permissions then select **Save**. Or to remove a delegate, select the delegate's name, then select **Delete**.

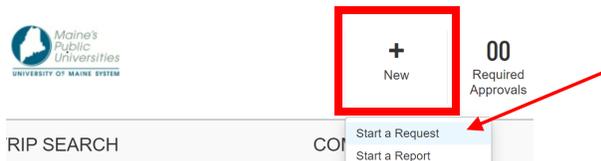


Travel Requests

An approved travel request is supervisory and financial permission to travel and or accrue expenses on behalf of the University. A travel request should always be approved before the travel/event takes place and should include relevant expenses. Per [University policy](#) travel requests are required for out-of-state and international travel. If you are only requesting a cash advance, you still need to create a travel request.

Note: Before creating a travel request, you'll need the department chart field (business unit, department, fund, etc.). Your supervisor or appropriate contact will have this information.

1. From your Concur homepage select **New**, then select **Start a Request**.



2. Complete the **Create New Request** required fields (*) and select **Create Request**. See tips below.

Create New Request ✕

* Required field

Request Policy *	Request Name *	Start Date *
<input type="text" value="*UMS-Travel Request Policy"/>	<input type="text" value="M. McPherson Huskies Conference"/>	<input type="text" value="06/02/2023"/>
End Date *	Purpose *	Travel Type *
<input type="text" value="06/05/2023"/>	<input type="text" value="Conference/Training"/>	<input type="text" value="Out-of-State"/>
Business Unit *	Department *	Fund *
<input type="text" value="(UMS06) University of Southern Maine"/>	<input type="text" value="(6154000) Graduate Programs"/>	<input type="text" value="(00) Unrestricted E&G"/>
Operating Unit *	Program	Project
<input type="text" value="Search by Code"/>	<input type="text" value="Search by Text"/>	<input type="text" value="Search by Text"/>
Class	Main Destination City *	Fed Meal Allowance (Admin Use Only)
<input type="text" value="Search by Text"/>	<input type="text" value="Boston, Massachusetts"/>	<input type="text"/>

Comment

Cancel

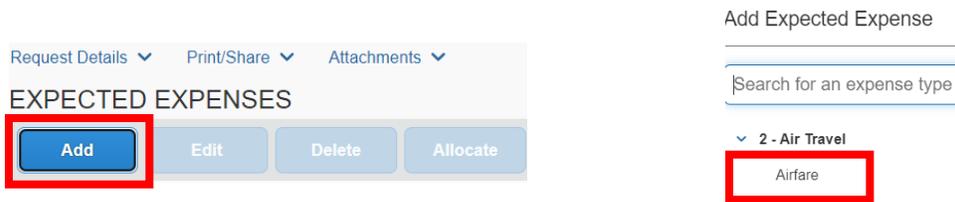
a. Travel Request Field Tips

- Request Policy: Choose UMS-Travel Request Policy
- Request Name: Enter first initial, last name, and/or something symbolic about the travel/event (32-character max)
- Start Date: Enter the first date of travel/event
- End Date: Enter the last date of travel/event
- Purpose: Use the dropdown menu to select the appropriate category
- Travel Type: Use the dropdown menu to select the appropriate type
- Business Unit, Department, and Fund: Enter appropriate chart fields
- Operating Unit, Program, Project, and Class: These are not required, enter if appropriate
- Main Destination City: Enter your travel destination
- Comment: Add a comment as appropriate

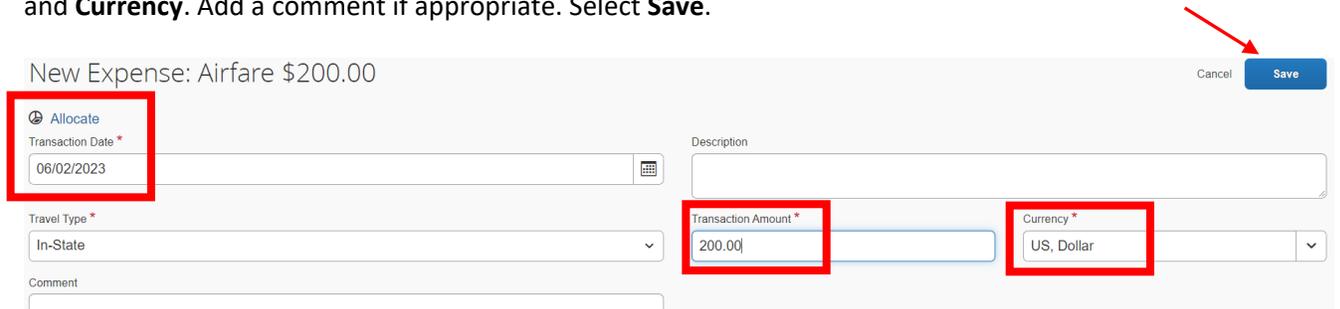
a) Expected Expenses

Whether you are paying for expenses out of pocket, or a University employee is paying, a travel request requires expenses.

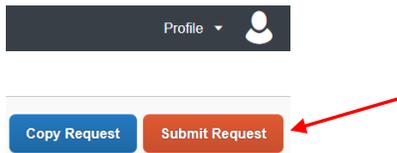
1. Under **Expected Expenses**, select **Add**. From the **Add Expenses** popup box, select the appropriate expense type.



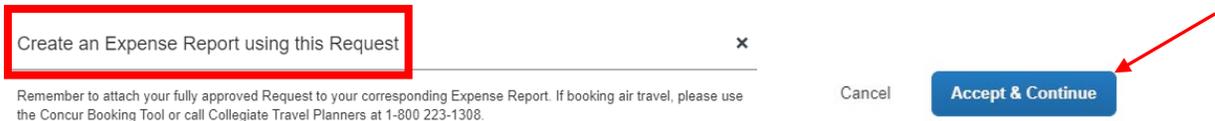
2. In the **New Expense** box, complete the **Transaction Date** (your first date of travel), **Transaction Amount**, and **Currency**. Add a comment if appropriate. Select **Save**.



3. Repeat steps 1 and 2 as appropriate. When complete, select **Submit Request**.



4. Read the **Create Expense Report using this Request** note, then select **Accept & Continue**.

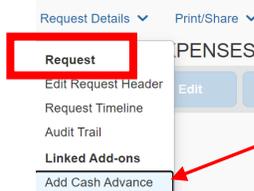


Once submitted, the travel request will be automatically sent to your supervisor for approval. Next, the request will automatically be sent for financial approval. Once fully approved, you'll receive an email notification. This is your indication that travel booking/expense can occur. For booking information, see page 15.

b) Cash Advances

A cash advance is an option to receive cash two weeks prior to your travel/event. If cash is needed sooner, contact your supervisor.

1. From the **Request Details** link, select **Add Cash Advance**.



- In the **Cash Advance Timeline**, complete the **Cash Advance Amount** and **Currency**. Add a comment if appropriate. Select **Save**. *Note: For domestic travel, up to \$500 can be requested. For international travel, up to \$1,000 can be requested.*

M. McPherson Huskie Conference Cancel **Save**

Cash Advance Timeline

Details Expenses

Cash Advance Amount * Currency *

Cash Advance Comment

- When complete, select **Submit Request**.

Profile

Copy Request **Submit Request**

- Read the **Create Expense Report using this Request** note, then select **Accept & Continue**.

Create an Expense Report using this Request ×

Remember to attach your fully approved Request to your corresponding Expense Report. If booking air travel, please use the Concur Booking Tool or call Collegiate Travel Planners at 1-800 223-1308.

Cancel **Accept & Continue**

Once submitted, the travel request will be automatically sent to your supervisor for approval. Next, the request will automatically be sent for financial approval. Once fully approved, you'll receive an email notification. This is your indication that travel booking/expense can occur. For booking information, see page 15.

Travel Expense Reports

A travel expense report is filed after your travel/event has taken place. This report accounts for expenses made and should be filed when a cash advance was issued, and/or expenses were incurred out of your pocket that you need to be reimbursed for.

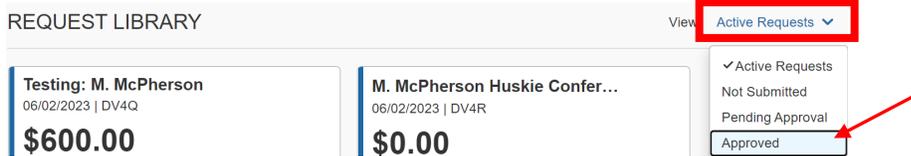
As best practice, an expense report should be created from an approved travel request whenever possible. If creating an expense report without a travel request, you'll need the department chart fields (business unit, department, fund, etc.). Your supervisor or appropriate contact will have this information.

a) Creating With an Approved Travel Request

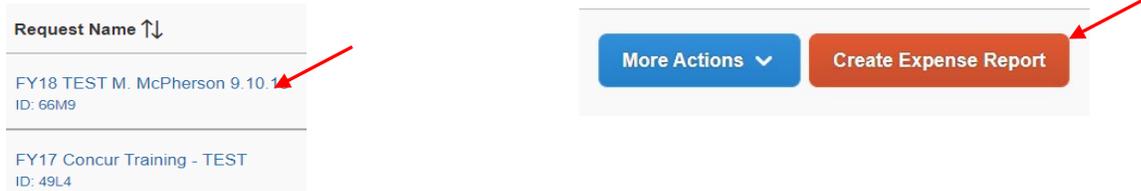
- From your Concur homepage select **Requests**.

SAP Concur **Requests** Travel

- From your **Request Library** change the **View** dropdown menu to **Approved**.



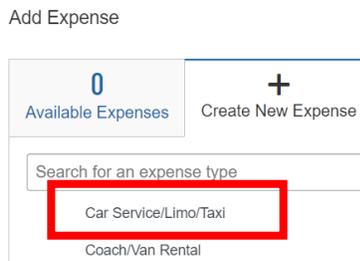
3. Select the appropriate **Request Name**. When the Request opens, select **Create Expense Report**.



4. Select **Add Expense** to begin requesting reimbursement or account for expenses a cash advance was used for.



5. From the **Add Expense** box, under the **Create New Expense** tab, select the appropriate expense type.



6. Complete the required fields. *Note: **Payment Type** should always be **Cash**.*

Expense Type *

Transaction Date *

*Business Purpose *

Enter Vendor Name *

City of Purchase *

Travel Type *

Payment Type *

Amount *

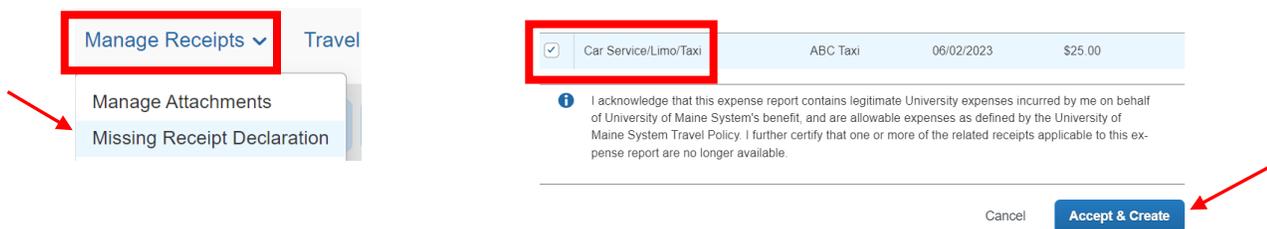
Currency *

Comment

7. Select **Add Receipt** image to upload a PDF of your receipt. Select **Save Expense**.



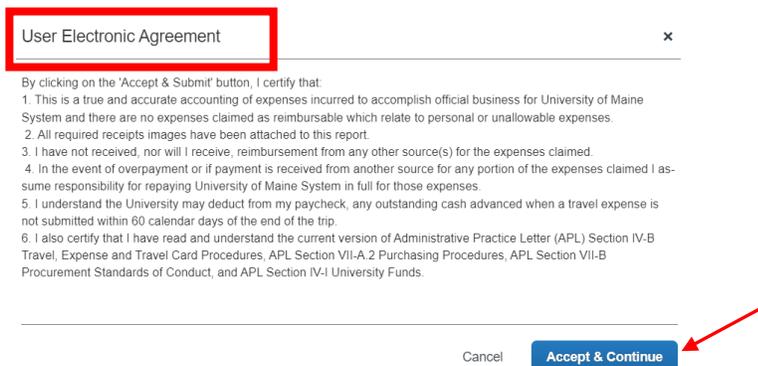
For expenses that you do not have a receipt, select **Manage Receipts**, select **Missing Receipt Declaration**, select the appropriate expense(s), then select **Accept & Create**.



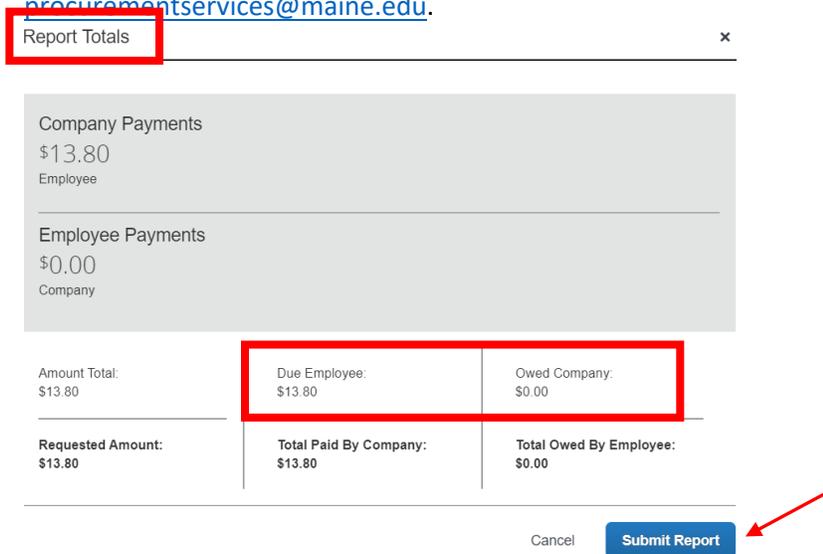
8. Repeat steps 4 through 7 for all other business expenses. Once complete, select **Submit Report**.



9. Read the **User Electronic Agreement** before selecting **Accept & Continue**.



10. Review the **Report Totals** before selecting **Submit Report**. If the **Due Employee** (your reimbursement portion) and **Owed Company** (portion owed back to the University) are incorrect, contact Procurement Services at procurement@maine.edu.



Once submitted, the expense report will be automatically sent to your supervisor for approval. Next, the report will automatically be sent for financial approval. Once fully approved, you'll receive an email notification.

b) Creating Without an Approved Travel Request

1. From your Concur homepage select **New** then **select Start a Report**.



2. Complete the **Create New Report** required fields (*) and select **Create Report**. See below for tips.

a. Report Field Tips

- xi. Policy: Choose UMS-Travel Request Policy
- xii. Report Name: Enter first initial, last name, and/or something symbolic about the travel/event (32-character max)
- xiii. Business Purpose: Use the dropdown menu to select the appropriate category
- xiv. Travel Type: Use the dropdown menu to select the appropriate type
- xv. Start Date: Enter the first date of travel/event
- xvi. End Date: Enter the last date of travel/event
- xvii. Business Unit, Department, and Fund: Enter appropriate chart fields
- xviii. Operating Unit, Program, Project, and Class: These are also chart fields but are not required, enter only if applicable
- xix. Comment: Add a comment as appropriate

3. To add expenses, follow steps 4 through 10 above (pages 12 through 14).

Once approved, reimbursements are issued in accordance with the Accounts Payable Check Run. [Click here](#) for the most current schedule.

Booking Travel

Students can use the booking tool on their Concur homepage or call a Collegiate Travel Planners (CTP) agent to book airfare, trains, hotels, and car rentals. Booking fees do apply (see below). Note: Airfare is required to be booked in Concur or with a CTP agent.

Booking fees:

- Booking Tool...\$5 per booking
- CPT agent...\$25 (domestic) or \$27 (international)

If attending a conference or event where there is a reduced rate for lodging, complete the reservation directly with that venue.

For questions about reservations made in Concur or with an agent, contact our Travel Administrator at procurementservices@maine.edu.

University Resources

Visit [Strategic Procurement's Website](#) (*MyCampus Portal LaunchPad > UMS Quick Links > Strategic Procurement*) for these resources.

1. University Policies (APLs) - Before traveling, we encourage travelers to review the following Administrative Practice Letters (APLs):
 - a) [Travel, Expense and Corporate Card Procedures](#)
 - b) [Sales Tax](#)
2. Travel tips and information
3. Training, including user guides and snippets