# Concur

# Creating a Request

Requests should be completed and approved for all instate and out-of-state travel/events. One blanket request for the fiscal year's instate travel should be completed before July 1st. Out-of-state travel requires a separate request.

<u>Check if you have a request already made</u>

On Concur homepage:
1. Select "Requests" on top banner.
2. Select dropdown "View" menu: All Requests.
3. See if you have already made a request.

<u>If you have not made a request before</u>

On Concur homepage:
1. Select "Requests" on top banner.
2. Select "New Request."

On Create Request page:

| Name | Any relevant title |
|---|---|
| Start Date | Date of first expense, OR 7/01/YYYY |
| End Date | 6/30/YYYY for end of year |
| Purpose | Most relevant category; mileage is Field Work |
| Travel Type | Most relevant category |
| Department | See chartfield responsible for expenses |
| Fund | ^ |
| Program/Project | ^ |
| Class | Only if required |

Select "Save."

On Request page:

1. <u>Skip</u> "Segments" section.
2. Select "Expenses" tab.
3. Select "Mileage" at bottom of right-hand box.

4. Enter start date.
5. Enter an estimate for total: ex. $500 or $1,000.
6. Select "Save."
7. Select "Submit Request."

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## Creating an Expense Report

**Note:** Do <u>not</u> create a new report for instate mileage, instate events, or out-of-state events. You will only create a new report for supplies and materials bought. Otherwise, follow the Linking Expenses to a Request steps.

On Concur homepage:

If you have expenses in Concur (paid with your T-card)
3. Select "Available Expenses" in header.
4. Select all relevant expenses.
5. Dropdown box "Move" To New Report.

If you have expenses to manually report
1. Select "Expenses" in header.
2. Select "Create New Report."

On Create Report page:

| Name | Any relevant title |
|---|---|
| Business Purpose | Most relevant category |
| Travel Type | Most relevant category |
| Business Unit | UMS05 |
| Department | See chartfield responsible for expenses |
| Fund | ^ |
| Program/Project | ^ |
| Class | Only if required |
| Comment | Only if necessary |

1. Select "Next."
2. "Does this include a meal?" Answer No.

On Expense Report page:

Hotels and lodging
1. Select hotel expense in right-hand box.
2. Make sure all information is filled in correctly.
3. Select "Itemize" in lower-right box.
4. Enter check-in and check-out dates.
5. Enter room rate.
6. Enter all room tax as one total.
   a. If there is no tax, you must enter 0 to proceed.
7. Select "Save."
8. Scan receipts if you have not done so.
9. Under header, dropdown box "Receipts" Attach Receipt Images.
10. Attach all receipts.

## Linking Expenses to a Request

**Note:** Other than supplies and materials, all expenses should be linked to a previously submitted and approved Request.

On Concur homepage:

1. Select "Requests" on top banner.
2. Select dropdown "View" All Requests.
3. Click on the request you made earlier.

On Request page:

1. Verify that the chartfield is correctly entered.
2. Select "Next."
3. When asked if your travel included a meal, answer accordingly.
   a. If you did have a meal, skip to Setting up an Itinerary.
4. On left-hand side of the new page, scroll down to select "University Mileage."
5. Enter transaction date of when you traveled.
6. Enter destinations in "City, State Abbreviation" format.
7. Enter miles traveled.
   a. If you do not know the mileage, scroll to bottom and select "Mileage Calculator." A pop-up box will calculate the mileage. Select "Save" at the bottom of the box.

b. If you have a **round-trip**, open "Mileage Calculator" and select "Make round-trip" option in pop-up box. It will calculate automatically. Select "Save."

8. Select "Save" to finish expense.
9. Enter all expenses for this request.
10. When you are finished, you may save and exit the expense report.

When you are finished traveling for this expense report, select "Submit Report."

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## Setting up an Itinerary

Follow the steps from Linking Expenses to a Request until Concur asks "Does this report include Travel Meals?" This is where you begin.

On Create Report page:
1. Select Yes.
2. Enter the departure city.
3. Enter date of departure.
4. Enter time of departure, specifying AM or PM.
5. Enter the same information for arrival.
6. Save your information.

Your itinerary is half done. Fill in the same information, from your destination back to wherever you originated to complete the itinerary. Save again.

Select Next>> to proceed.

1. Double-check your itinerary's information.
2. When ready, select Done.

On Report page:
1. If your meal was paid for with a T-Card, select Import Expenses underneath the Report name.
2. If your meal was paid for with other methods, select "Travel Meal Expense" from the right-hand list of expenses.
3. Enter date of meal.
4. Enter vendor of meal.
5. Enter city of purchase.
6. Select whichever payment type you used and the amount of meal.
7. Save the expense.

An alert will display at the top of the page but <u>will not</u> stop you from submitting the report. Return to Linking Expenses to a Request to continue recording your travel.

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## Adding Delegates to your Concur account

Adding a delegate will allow somebody to view your account exactly as you see it. This significantly improves troubleshooting and training.

On Concur homepage:

1. Select "Profile" in top right corner.
2. Select "Profile Settings."

On Profile Options page:

1. On left-hand side, look beneath Expense Settings header for "Expense Delegates."
2. On new page, select "Add."
3. Type in the delegate's last name or Empl ID.
4. Select their name from the drop-down box.
5. Select "Save" to finish.

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## Setting up Concur Mobile App

The mobile app for Concur is very useful in keeping receipts organized. While you are traveling, open the application on your device and take a photo of any receipts you collect. Once they have been securely photographed, they will be uploaded directly to Concur's server, and you may then discard the receipts.

*Note: Not all features are available yet on the app. Submitting reports should be done via the computer client, as requests cannot yet be linked through the app.*

On Concur homepage:

1. Select "Profile" in top right corner.

2. Select "Profile Settings."

On Profile Options page:

1. Select "Mobile Registration" under Profile Options.
2. Under "Password" select "create a mobile PIN" link.
3. Enter a PIN for use with the app.

On mobile device:

1. Download Concur app.
2. Open app.
3. Enter yourname@maine.edu email.
4. Enter your PIN number.

Saving receipts:

1. Open app.
2. Select "Receipt" on lower blue banner.
3. Take a photo of the entire receipt. Try to capture a clear image of the whole slip.
4. Verify "OK" on the photo.
5. Select save icon. (left icon)
6. Receipt will upload to Concur.
7. Discard all photographed receipts.