**Concur Travel and Expense – Directions**

Concur helps travelers to submit expense reports and employee travel reimbursements.

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| --- | --- | --- |
| **Procurement Coordinator** | **Email** | **Phone** |
| Kelly Bannen | Kelly.bannen@maine.edu | 207.581.2612 |
| Kim Heath | Kim.heath@maine.edu | 207.581.2697 |

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| **Travel Administrator** | **Email** | **Phone** |
| Nina Conners | Nina.conners@maine.edu | 207.581.2708 |

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| --- | --- | --- |
| **Grant Manager** | **Email** | **Phone** |
| Gail Belanger | Belanger@maine.edu | 207.581.2881 |

**ACCESS**:

Log into <https://www.concursolutions.com>

Enter your User Name and Password (Hint: this is the same as your UMS User Name and Password. *Ex. john.smith@maine.edu*)

Click **Login**

**STEP I: SET UP PROFILE**

In the upper right corner select **Profile > Profile Settings**

* Under **Your Information,** click Personal Information in the middle of the page.

Enter appropriate information, then click **Save**.

* **Be sure that your displayed name is identical** to your photo identification that you will present at the airport. *If your name is incorrect, contact Travel Administrator.*
* Under **Contact Information**, you must have either a **Work Phone** or a **Home Phone** entered in order to book travel.
* Under **Email Address**, an email address must be provided. Please use your @maine.edu address. **The email address must be verified – Click Verify**.
* An email will be sent with a **Verification Code**, copy/paste this into **Enter Code box**. **Click OK**.
* Under **Emergency Contact**, provide this information even though it is not a required field.
* Under **Travel Preferences**, enter your TSA Secure Flight information.
* Under **International Travel: Passports and Visas**, if needed, click **Add a Visa**, enter and hit **Save**.
* Under **Credit Cards**, click **Add a Credit Card to store UMS Travel card information**.
* **Credit Card Billing Address**: 5761 Keyo Building, Orono, ME 04469-5761

**STEP II: CHANGE REQUEST PREFERENCES**

* Under **Request Settings** menu on the left, click **Request Preferences**
* In the **Send email when**… section, select appropriate areas
* In the **Prompt…section**, select the appropriate areas
* Click **Save**.

**STEP III: TRAVEL REQUISITIONS**

A travel **Requisition** or **Request** is an electronic equivalent to the paper travel authorization form. It requires supervisor approval and allows the grant manager (Gail Belanger) to sign off on funds for a trip ***PRIOR*** to booking.

*A traveler can create a* ***“blanket” long term travel requisition*** *for one-time in-state travel approval. To qualify as a blanket requisition, the requisition must be fixed length (monthly, quarterly, per semester, or fiscal year.) There must be a high level budgetary number associated with the estimated spend for that period. It can be pulled into an expense report repeatedly creating a declining balance in the travel requisition.*

* Click **Requests** > **New Request**
* **Request Name** = Choose a name you want to assign for your travel. Ex. Trip to Dallas
* Select a **Start Date** and **End Date**
	+ *If you are able to create a blanket request, select an end date that matches your needs. Ex. If you are traveling for the fiscal year, your end date would be June 30th.* ***\*Please pay special attention to what qualifies for blanket travel requests.***
* Enter a **Purpose** Ex. Field Work
* Enter a **Travel Type**
* Enter **Chartfield Information:**

***CONCUR AUTOMATICALLY POPULATES THE E & G ACCOUNT! YOU MUST CHANGE THIS OR YOUR REQUEST WILL BE RETURNED TO YOU!***

Chartfield accounting information should always be entered in the following way:



**Example: Your PEOPLESOFT Chartfield may look like this:**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| FAST # | PI | ACT NAME | DEPT ID | FUND | PROGRAM | PROJECT | TERM | REFERRED TO AS |

5-0-16777 SMITH MAFES-FED 5209982 22 59158 5500000 MAFES

*The only thing that you need to enter is this***:**

**Business Unit: (UMS05) University of Maine**

**Department ID#**

**Fund#**

**Program#**

**Project#**

You will not need to indicate an Operating Unit.

*Department ID# will default to the SFR E &G. It is your responsibility to enter your accounting information correctly.* If you use the Teaching Account without prior approval from the Director your report will be returned to you for correction.

* Enter **Cash Advance**, if required for travel.
	+ Select **Expense Type** and **Transportation Date** (anticipated)
* Hit **Save**
* Check the status of your request by clicking the **Manage Requests** tab > **Active Requests** > Under **Status**, look for “Approved.”

**STEP IV: Create an Expense Report**

After your request has been approved, it’s time to create an Expense Report.

* Click **Requests**
* Check box next to Approved **Request**
* Click on **Expense** hyperlink in far right of the Request ID
* Chartfield information will auto-populate from your **Request**
* Click **Next**
* If applicable, enter **Meals**
* Click **New Expense**
* Choose **Expense Type**
* If entering mileage, choose **University Mileage**. If unsure of mileage distance, click **Mileage Calculator** (tied to Google Maps.)
* If carpooling when using **University Mileage**, select the **Carpooling** drop down. Concur will generate an **Action Required** icon next to your expense. Click the red **Action Required** Icon and identify the other passengers by clicking **New Attendee**.
* The only items on an **Expense Report** that DO NOT require receipts are individual meals and tolls. Every other item entered on an **Expense Report** will generate an **Action Required** icon.
* After submitting you will receive a summary window. Be sure to write down your **Request ID**. The **Request ID** will be required for **Booking**.

**STEP V: Booking**

* Click **Travel**
* Enter **Departure City**, **Arrival City**, **Departure Date** and **Departure Return**
* Click **Pick-Up/Drop-Off Car** and **Find Hotel**, if applicable.
* Enter **Reference Point** or **Zip Code**
* Click **Search**
* Pop-up Confirmation Window will appear. Confirm the location.
* Click **Show Matrix** in the top right.
* Filter by preference of carrier
* **Green** = Good, In policy. **Yellow** = Out of Policy, will need explanation and approval. **Red** = Bad, Will not be approved.
* Look for text in RED after **Arrive** column. These are tips on layovers.
* Click **Compare** and another carrier for information about different fares.
* Click **Select** on the fare that you want and you will move on to the **Review and Reserve Flight** window.
* Review flight details and indicate any **Frequent Flyer** programs
* Click **Select Seats** and indicate on the **Seating Map** where you want to sit.
* Move between flights to indicate seats on departing/arriving flights in the upper right under **Available Flights**. *\*If you receive an error message* ***“Sorry, we are unable to display seatmap for this flight”*** *it means the flight is close to selling out. Based on your flight preferences you will be seated where they can seat you.*
* Select a **Method of Payment** drop down to show your **Travel Card** info.
* Click **Reserve Flight** and **Continue**
	+ Keep in mind that you are reserving a SEAT on the flight, not the flight price. Price is negotiable until the day that you pay for the ticket.
* If **Find a Hotel** was indicated, the system will now move you to possible hotel bookings.
* You can filter by price, hotel name, etc.
* Click **View Rates; and**
* **Select**
* You will be provided with a confirmation window, please review.
* Select a **Method of Payment**, your **Travel Card** info. You will not be charged for the room until you check-out but the **Travel Card** is required to reserve the room.
* Read the **Rate, Rules, Restrictions and Cancellation Policy** and Click **I AGREE** box.
* Click **Reserve Hotel** and **Continue**.
* **Trip Summary** window will indicate all reservations
* Click **Next**
* **Trip Booking Info: DO NOT TYPE ANYTHING IN MIDDLE TEXT UNDER TRIP NAME/DESCRIPTION BOX UNLESS YOU HAVE A CANCELLED TICKET THAT YOU ARE RECEIVING CREDIT FOR. IT WILL CAUSE CONCUR TO FREEZE BECAUSE IT IS SEARCHING FOR THAT CANCELLED TICKET.**
* Select that **YES** you have received approval
* Enter trip **REQUEST ID**
* Click **Next** to purchase; Or,
* Click **Hold** and go to **Trip Library** to see when the trip will be cancelled (system cancels within 24 hours, typically.)

**\*\*\*WHEN USING GRANT MONEY FOR FLIGHT TRAVEL – YOU MUST COMPLY WITH THE FLY AMERICA ACT – A US FLAG CARRIER (US OWNED AND OPERATED COMPANY) MUST BE USED – LOOK FOR THE FLAG ICON WHEN SELECTING A FLIGHT \*\*\***

**ADDITIONAL RESOURCES:**

**Travel Program 101 – What You Need to Know**

[**https://mycampus.maine.edu/group/mycampus/travel**](https://mycampus.maine.edu/group/mycampus/travel)

Look at the left hand side of this page under **Documents** for additional assistance in specific areas of travel. There are PDFs, recorded webinars, information on policy changes, etc.

**VIDEO**

**https://www.youtube.com/watch?v=kfR1Xy9xhJM**

**Click on a time to skip to video sections**

|  |  |
| --- | --- |
| **Time** | **Topic / Section** |
| [**0:00**](https://mycampus.maine.edu/group/mycampus/travel#ConcurWebinar) | Introduction, goals and agenda |
| [**4:09**](https://mycampus.maine.edu/group/mycampus/travel#ConcurWebinar) | Background on Concur Travel and Expense Reimbursement System |
| [**6:17**](https://mycampus.maine.edu/group/mycampus/travel#ConcurWebinar) | Background on Short's Travel Management (TMC) |
| [**7:22**](https://mycampus.maine.edu/group/mycampus/travel#ConcurWebinar) | The Concur Travel and Expense Reimbursement System "Beyond the Basics" |
| [**1:10:00**](https://mycampus.maine.edu/group/mycampus/travel#ConcurWebinar) | Creating and Submitting a Travel Expense Report |
| [**1:41:50**](https://mycampus.maine.edu/group/mycampus/travel#ConcurWebinar) | Creating and Submitting a Non-Travel Expense Report |
| [**1:56:30**](https://mycampus.maine.edu/group/mycampus/travel#ConcurWebinar) | Q&A |
| [**1:58:05**](https://mycampus.maine.edu/group/mycampus/travel#ConcurWebinar) | Dates / Training Information |
| [**1:58:32**](https://mycampus.maine.edu/group/mycampus/travel#ConcurWebinar) | University Contacts |