Concur Travel and Expense – Directions

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

**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: TRAVEL REQUISITIONS**

A travel Requisition or Request is an electronic equivalent to the paper travel authorization form. It allows the supervisor to pre-approve the travel, which is required for insurance purposes. **Note that this must be done prior to date of travel.**

- 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:**

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

The only thing that you need to enter is this:

- **Report Name:** GSBSE Annual Meeting
- **Business Unit:** (UMS05) University of Maine
- **Department ID#** 5501921
- **Fund#** 23
- **Program#** 58831

- 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 II: 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 within the per diem rate and tolls. Every other item entered on an Expense Report will generate an Action Required icon.