

Graduate Student Professional Development Fund *Concur Student User Guide*

Congratulations on your recent award from the Graduate Student Professional Development Fund (GSPDF)! This fund was created to provide financial support for graduate students like you pursuing professional development opportunities.

Your award will be processed in Concur, the University's travel and reimbursement system.

Before your award can be processed, you'll need to fill in all required fields and make **ASHLEY** your delegate by following the instructions below.

Thank you,

Ashley Dougherty

Graduate Assistant, Office of Graduate Studies

Melissa Campbell

Procurement Coordinator, University of Maine System

FMI or questions please contact:

Ashley Dougherty, Graduate Assistant, Office of Graduate Studies, University of Southern Maine
207-780-4812 | ashley.reagan@maine.edu

Melissa Campbell, Procurement Coordinator, Strategic Procurement, University of Maine System
207-780-5207 | melissa.campbell@maine.edu

Ensuring your access to Concur



During the award process, your Concur account will be setup. To verify that your account has been setup, log into your Campus Portal (<http://my.usm.maine.edu>) and look for the Concur icon (pictured left) in the Launchpad.

If you don't have the icon, and you have received account verification (from Ashley Dougherty or Melissa Campbell), contact **USM's Help Desk at 207-780-4029** for assistance.

Reimbursement

Once your Concur account is active, you'll need to update your Employee Self-Service Travel and Expense profile:

From the main page in **MaineStreet**, navigate to **Employee Self-Service**, select **Travel and Expenses**, then select **DirectDep Personal Data OrgData**.

The screenshot shows the MaineStreet portal interface. At the top, there is a navigation bar with the University of Maine System logo and the text "Maine's Public Universities". Below this is a "Main Menu" section with various options. The "Travel and Expenses" menu item is circled in red, and its sub-items, including "DirectDep Personal Data OrgData", are visible. To the right, there is a "MaineStreet News" section with a "Welcome to the MaineStreet" message and a "Maintenance Alert" for Friday, February 24th. Below the alert, there is a link for "Sexual Assault Prevention Training".

Next, select the **Personal Data** tab. Please confirm/update your employee/student information, home address, mailing address and where to send payments to. Click **Save** once complete.

Direct Deposits | **Personal Data** | Organizational Data | Check Example

Employee Information

*Last Name

*First Name

Middle Name

Employee Base: Home

Office

Telephone

Payments Sent To: Home Address

Mailing Address

*Personnel Status

Home Address

Country

Address 1

Address 2

Address 3

City

County

Postal

State

Mailing Address

Country

Address 1

Address 2

Address 3

Bypass HR Update

City

County

Postal

State

 Save

Direct Deposit | Personal Data | Organizational Data | Check Example

Check

The system that processes travel **is separate from the system that processes student payroll. Even if you have setup direct deposit for student payroll, mailed checks will be the default payment method for travel, until you setup the direct deposit for travel.**

Direct deposit

Students who wish to receive funds via direct deposit need to update their Travel & Expense profile in MaineStreet.

Next, navigate to the **Direct Deposit** tab.

If you would like to receive your cash advance/reimbursement via **direct deposit**, add your bank information in the appropriate boxes. If you need assistance with locating your bank information from a check, select the **Check Example** button. **Save** all changes.

The screenshot shows the 'Maine's Public Universities' logo and 'UNIVERSITY OF MAINE SYSTEM' header. The navigation path is: Favorites | Main Menu > Employee Self-Service > Travel and Expenses > DirectDep PersonalData OrgData. The 'Direct Deposit' tab is selected and circled in red. Below the tabs, the 'Travel & Expense Direct Deposit' section contains a 'Check Example' button circled in red. The 'Instructions' section provides guidance on direct deposit. Below this, the bank information fields are circled in red: '*Bank Account Type' (dropdown), 'Routing Number' (text box), and 'Account Number' (text box). The 'Detailed Instructions' section explains the process. At the bottom, a 'Save' button is circled in red. The footer shows the navigation path: Direct Deposit | Personal Data | Organizational Data | Check Example.

Concur login and profile validation



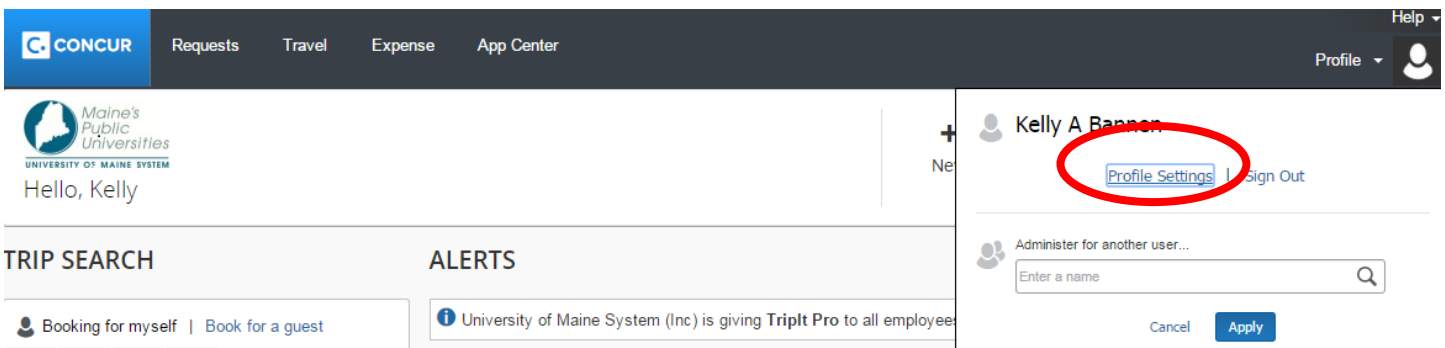
The main way to log into Concur is through your Campus Portal Launchpad. If you have the icon, select it and you will automatically be logged in and directed to the homepage.

Once logged in, your first step will be to validate your profile. Think of your Concur profile as similar to an online bank account. Your profile **MUST** be validated before creating and filing requests or reports.

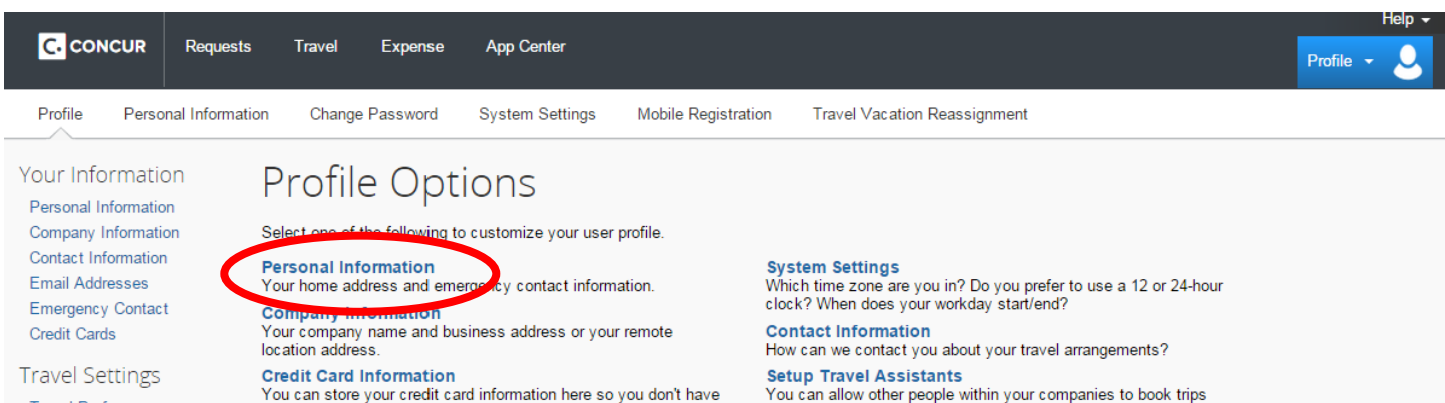
Select your **Profile** menu in the upper right corner of your screen.



Next, select **Profile Settings**.



Next, select **Personal Information**.



- #1.** Verify that your name is correct, including your Middle Name and Suffix. This should match your government-issued photo ID – such as a driver's license or passport – you will present to airport security.

#2. Verify that your Employee/Student ID is correct. In the **University Classification** field select **Student**.

Note: If your Student ID is incorrect, contact Melissa Campbell with your full legal name and correct Student ID.

#3. Enter either a **Work Phone** or **Home Phone**.

Note: Both are noted as required, but only one must be provided.

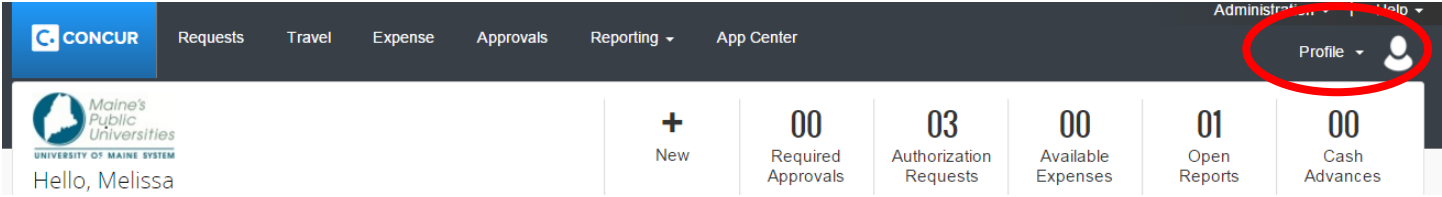
Work Phone [Required**] (207) 581-2612	Work Extension	Work Fax (207) 581-2698	2nd Work Phone/Remote Office
Home Phone [Required**]			
Pager	Other Phone		
Mobile Phone	Send Test Message		

****You must specify either a home phone or a work phone.**

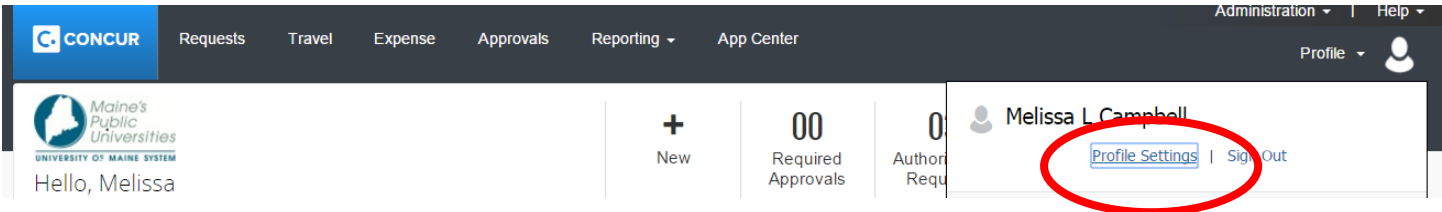
Assigning delegates

A delegate is someone who acts on your behalf. In GSPDF cases, Ashley Dougherty will be your delegate.

Select your **Profile** menu in the upper right corner of your screen.



Next select **Profile Settings**.



Next select **Expense Delegates**.

CONCUR | Requests | Travel | Expense | Approvals | Reporting | App

Profile | Personal Information | Change Password | System Settings | Mobile Registrati

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Program

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

Profile Options

Select one of the following to customize your user profile.

- Personal Information**
Your home address and emergency contact information.
- Company Information**
Your company name and business address or your remote location address.
- Credit Card Information**
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.
- Travel Profile Options**
Carrier, Hotel, Rental Car and other travel-related preferences.
- Expense Delegates**
Delegates are employees who are allowed to perform work on behalf of other employees.
- Expense Preferences**
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
- Change Password**
Change your password.

Next select **Add**. In the search field, enter **Ashley Dougherty**, then select **Add**.

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs

Expense Delegates

Delegates | Delegate For

Add **Save** **Delete**

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

Ashley Dougherty| **Add** Cancel

Ex **Ashley Dougherty** ashley.reagan@maine.edu

Select the box next to Ashley's name, and select the following boxes. Then select **Save**.

Expense Delegates

Delegates | Delegate For

Add **Save** **Delete**

Delegates are employees who are allowed to perform work on behalf of other employees.

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions to Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input checked="" type="checkbox"/>	Dougherty, Ashley ashley.reagan@maine.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>