



POSTGRAD RESEARCH CONCUR STUDENT GUIDE

Concur is an expense management system used by Curtin University to manage HDR student reimbursement claims. This guide provides a step by step guide to assist you through your reimbursement request.



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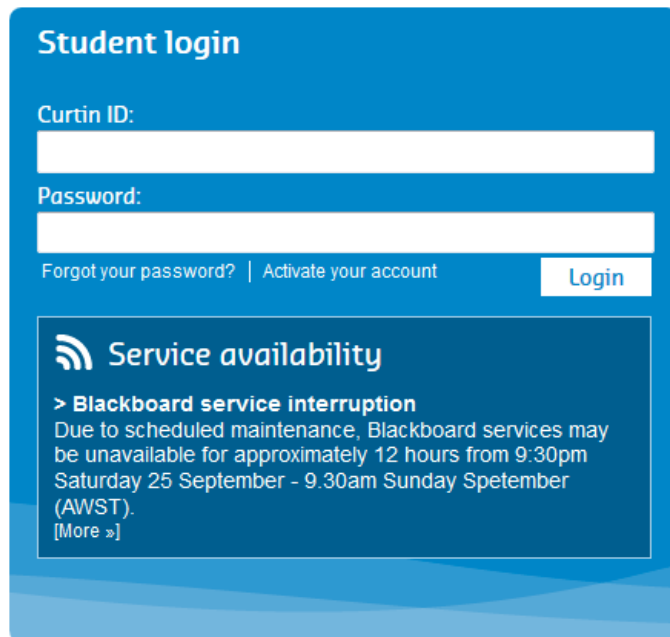
Access Concur

Step One

Sign in to your [Student Oasis](#) account.

You can access Student Oasis by following this link :

<https://oasis.curtin.edu.au/Auth/LogOn>



The screenshot shows the 'Student login' page. It features a blue header with the title 'Student login'. Below the header are two input fields: 'Curtin ID:' and 'Password:'. To the right of the password field is a 'Login' button. Below the input fields are two links: 'Forgot your password?' and 'Activate your account'. A 'Service availability' section is also present, with a red 'X' icon and the text: '> Blackboard service interruption. Due to scheduled maintenance, Blackboard services may be unavailable for approximately 12 hours from 9:30pm Saturday 25 September - 9.30am Sunday Spetember (AWST). [More >]'

Step Two

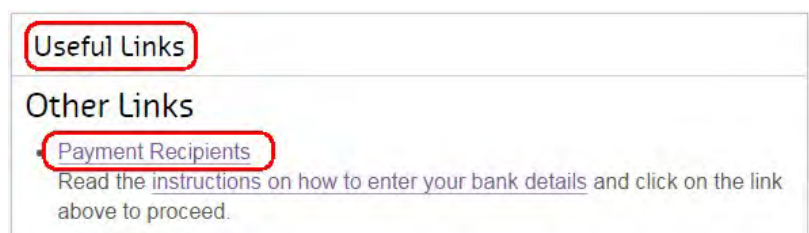
Click [My Studies](#) tab as shown in the screenshot



Step Three

Scroll down to [Useful Links](#) section.

Click the [Payment Recipients](#) link. This will redirect you to your Concur homepage.



If you are having issues logging into Concur, please contact [Concur Helpdesk@curtin.edu.au](mailto:Concur.Helpdesk@curtin.edu.au) or call 08 9266 2319.

Add Bank Details

Step One

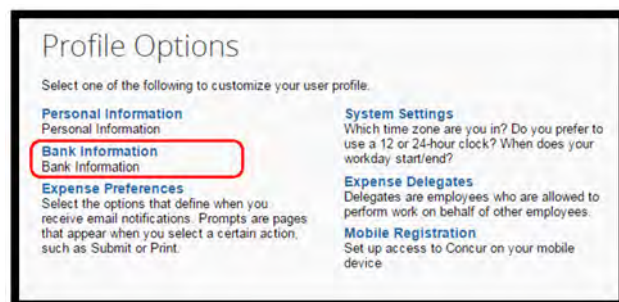
Click [Profile](#) from the top right side of your Concur page.

Click [Profile Settings](#) link.



Step Two

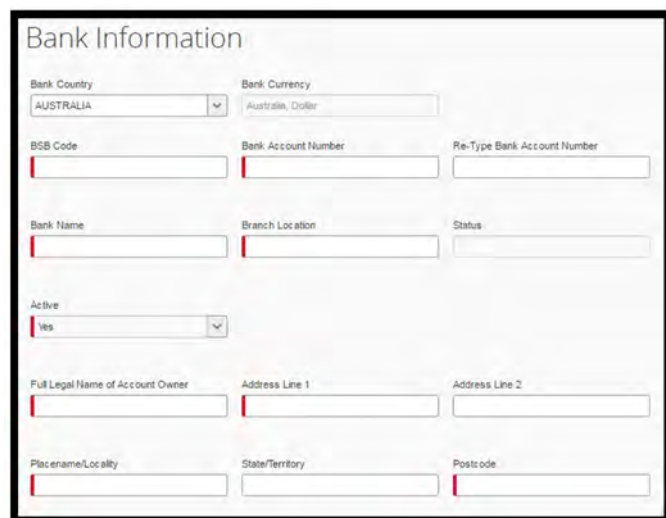
Choose [Bank Information](#) from the [Profile Options](#).



Step Three

Please read the field headers and complete each field accordingly.

- Go to www.bsbnumbers.com to search for your bank address.
- Ensure [Active](#) field is set as [Yes](#)



Step Four

Click [Save and Agree](#)



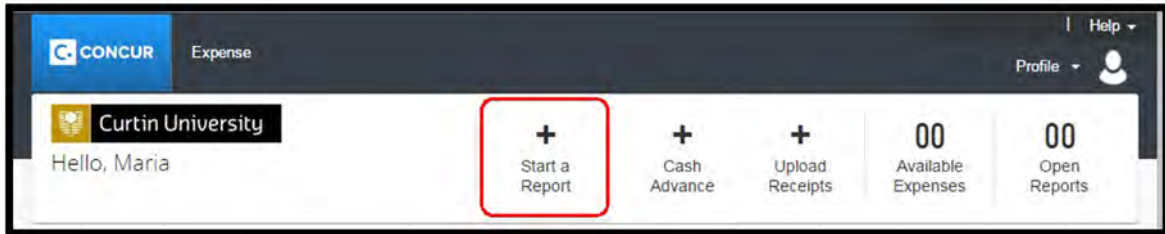


Key Points

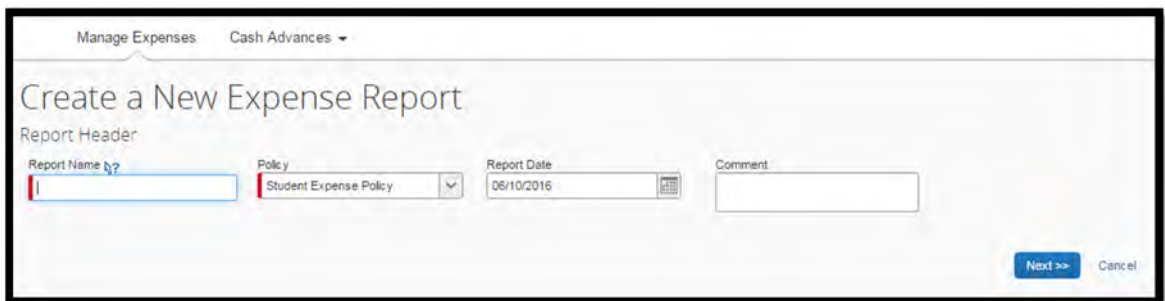
- Five cents will be credited to your nominated bank account within 2-3 business days and once the transaction is completed your bank account will be confirmed.
- An email notification will be sent to your student email account titled **Expense Pay Notification: Account Confirmation Sent**.
- Please note that if you do not receive the five cents deposit within 3-4 business days contact the Concur Helpdesk at ConcurHelpdesk@curtin.edu.au or by calling 08 9266 2319
- In the event that your bank account cannot be confirmed by Concur, you will receive an email notification in your student email account advising you. This email is titled **Expense Pay Notification: Payment Denied**. Simply follow the instructions in the email or contact the Concur Helpdesk for further assistance.
- If at any time your bank account details have changed, you will need to ensure that you update the details on Concur. Just follow the same steps

New Reimbursement Report

Step one: Select Start a Report on top of your Concur page.



Step 2:



Create a New Expense Report

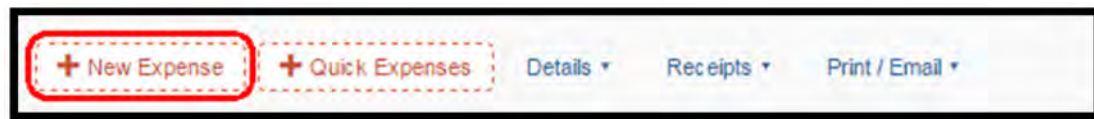
Report Name	HDR + "Your Initials" + Month/Year Example: HDR-MI-Sept2016
Policy	Student Expense Policy
Report Date	Use default date
Comment	Add any further information in this box.

Step 3: Click Next.

Create New Expense

Option 1: New Expense

Click **New Expense** or type in the expense description into the Expense search bar.



New Expense Available Receipts

Expense Type

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

<p>73401 Grants Provided</p> <p>Academic Staff Conference</p> <ul style="list-style-type: none"> 70113-Academic Staff Conference International Airfares 70115-Academic Conference Fees 70116-Academic Conference Accommodation 70117-Academic Conference General Expenses <p>Advertising</p> <ul style="list-style-type: none"> 72001-General Advertising <p>Books & Periodicals</p> <ul style="list-style-type: none"> 71901-Books & Monographs 71902-Lab Texts 71903-Journals, Periodicals & Serials 71905-Data Collection <p>Cleaning</p> <ul style="list-style-type: none"> 71201-Cleaning Contracts <p>Commercial Sales</p>	<p>...Other Student Support Expenses</p> <ul style="list-style-type: none"> 70362-Student Travel Expenses <p>Outsourced Work</p> <ul style="list-style-type: none"> 70211-Other Outsourced Work <p>Postage</p> <ul style="list-style-type: none"> 71801-Postal Expenses 71802-Courier Expenses 71803-Freight Expenses <p>Printing</p> <ul style="list-style-type: none"> 72601-Internal Print Services 72603-Printer Consumables Other Than Paper 72605-External Printing Expenses 72611-Binding <p>Prizes & Awards</p> <ul style="list-style-type: none"> 70301-Prizes & Awards
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Option 2: Quick Expense

Click **Quick Expense**. Fill all the required fields. Click **Save**.



Quick Expenses x

Quick Expenses

Expense Currency: AUD ▼

Date	Expense Type	Business Purpose	City	Receipt Status	Amount		
08/11/2016	70362-Student Travel....	Conference	Perth, Western Australia	Receipt	AUD 150.00	+	x
						+	x
						+	x
						+	x
						+	x
						+	x
						+	x
						+	x

Expense Type Selection

The following table highlights the items that are allowable under the general HDR student allowance.

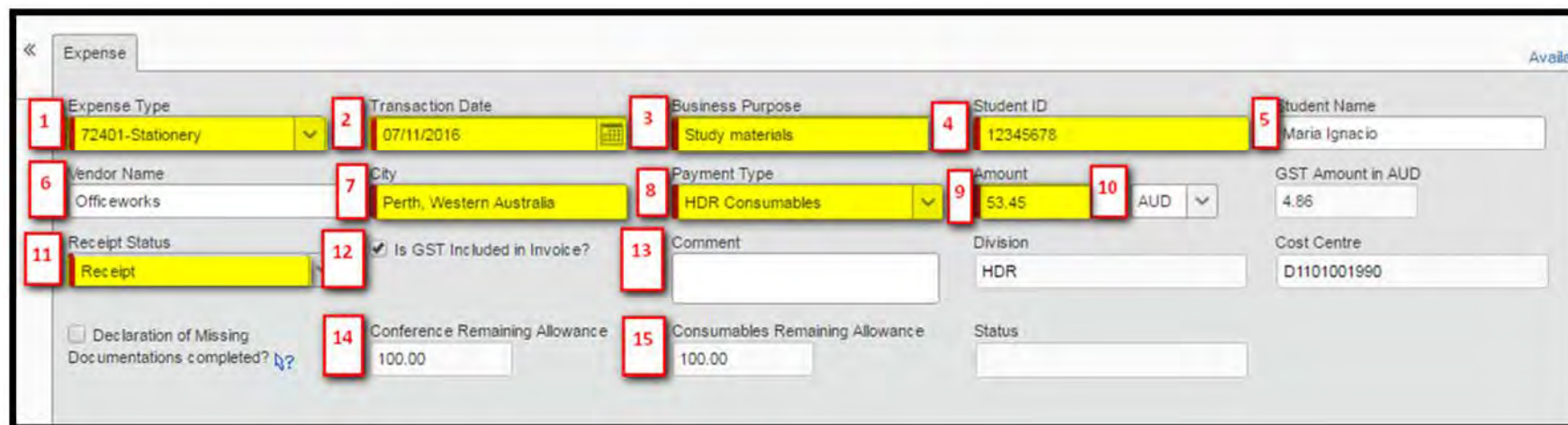
Conference Expenses:		
<i>Category</i>	<i>Expense Examples</i>	<i>Suggested Expense Type Selection</i>
Conference allowance	Conference registration	70361-PhD Student Conference Registration Fees
	Accommodation	70362-Student Travel Expenses
	Travel expenses	70362-Student Travel Expenses

Consumables Expenses:		
<i>Category</i>	<i>Expense Examples</i>	<i>Suggested Expense Type Selection</i>
Fieldwork	Airfare	70362-Student Travel Expenses
	Accommodation	70362-Student Travel Expenses
	Meal	70362-Student Travel Expenses
Workshops/Training Courses	Airfare	70362-Student Travel Expenses
	Accommodation	70362-Student Travel Expenses
Stationery	Stationery	72401-Stationery
	Internal printing/photocopying	72601-Internal Print Services
	External printing/photocopying	72605-External Printing Expenses
	Postage	71801-Postal Expenses
	Art supplies	72722 - Student Consumables
Specialist software	PC Software	72301-PC Software & Licence <\$5
Specialist textbooks	Manuals	71901-Books & Monograph
	Laboratory texts	71902-Lab Texts
Transcription/translation services	Transcription/Translation expenses	70313 - Student Thesis Allowance
Thesis	Database and data services	71905-Data Collection
	Binding	72611-Binding
Subscriptions	Subscriptions for journals, periodicals, serials	71903-Journals, Periodicals & Serials
Research incentives with express permission from the supervisor.	Movie tickets/vouchers	70315 - Student Support (written approval from the supervisor is required)
Local lab expenses not charged through local consumables from approved University supplier	Chemicals	72701-Chemicals
	Laboratory analysis	72702-Laboratory Analysis
	Laboratory expenses	72707-Laboratory Expenses
	Consumables	72722-Student Consumables
Other consumables/materials	Other consumables/materials	72769 - Other Consumables

If your expense is not listed in the options provided, please contact Concur Helpdesk at 9266 2319 or email address ConcurHelpdesk@curtin.edu.au for assistance

Expense Information

All fields highlighted in yellow are mandatory. However, you are encouraged to enter the information as completely as possible.



The screenshot shows an 'Expense' form with the following fields and callouts:

- 1: Expense Type (72401-Stationery)
- 2: Transaction Date (07/11/2016)
- 3: Business Purpose (Study materials)
- 4: Student ID (12345678)
- 5: Student Name (Maria Ignacio)
- 6: Vendor Name (Officeworks)
- 7: City (Perth, Western Australia)
- 8: Payment Type (HDR Consumables)
- 9: Amount (53.45)
- 10: Currency (AUD)
- 11: Receipt Status (Receipt)
- 12: Is GST Included in Invoice? (checked)
- 13: Comment
- 14: Conference Remaining Allowance (100.00)
- 15: Consumables Remaining Allowance (100.00)

1	Expense type is the category of the expense. Refer to page 7-8.	9	Enter the amount that is inclusive of GST.
2	This is the date when the purchase/payment was made.	10	Enter the payment currency. Australian Dollar (AUD) will be selected by default. Payments made to other currencies will be adjusted to Australian Dollar using the currency rate of the day.
3	Provide a brief description of the expense in this field. I.e. why the item was purchased or why the service was paid, what the payment is in relation to, etc.	11	An itemised receipt must always be provided.
4	Enter your student ID.	12	Leave the box ticked if the transaction has GST. Untick the box if GST is not applicable. Remove tick for transactions incurred outside of Australia.
5	Enter your name.	13	You are not required to enter a comment, but you are free to do so if you want to give more information about the expense.
6	This is an optional field where you can input the name of the vendor. You are strongly encouraged to enter this information.	14	The total amount of conference balance currently available to claim.
7	Provide the vendor's city of origin, or where the transaction was originally made	15	The total amount of consumable balance currently available to claim.
8	Refer to page 10		

Payment Type

HDR Consumables

Expense		Available Receipts	
Expense Type 70315 - Student Support	Transaction Date 10/10/2016	Business Purpose Research Incentives For Participant	Student ID 12345678
Student Name Maria Ignacio	Vendor Name Woolworths	City Perth, Western Australia	Payment Type HDR Consumables
Amount 10.00 AUD	GST Amount in AUD 0.91	Receipt Status Receipt	<input checked="" type="checkbox"/> Is GST Included in Invoice?
Comment	Division HDR	Cost Centre D1101001990	<input type="checkbox"/> Declaration of Missing Documentations completed? ?
Conference Remaining Allowance 2,500.00	Consumables Remaining Allowance 1,183.72	Status	
<input type="button" value="Save"/> <input type="button" value="Itemize"/> <input type="button" value="Allocate"/> <input type="button" value="Attach Receipt"/> <input type="button" value="Cancel"/>			

Complete all details. Ensure that payment type **HDR Consumables** is selected, if the expense falls under the Consumables category.

HDR Conference Support

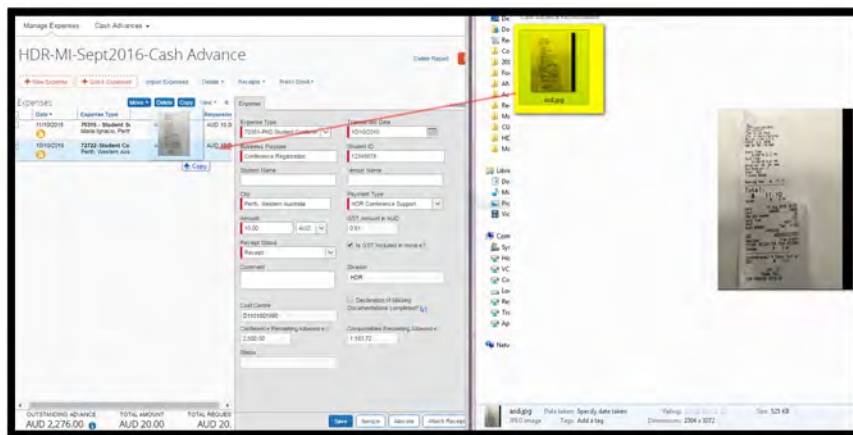
Expense		Available Receipts	
Expense Type 70361-PhD Student Conferen	Transaction Date 10/10/2016	Business Purpose Conference Registration	Student ID 12345678
Student Name	Vendor Name	City Perth, Western Australia	Payment Type HDR Conference Support
Amount 10.00 AUD	GST Amount in AUD 0.91	Receipt Status Receipt	<input checked="" type="checkbox"/> Is GST Included in Invoice?
Comment	Division HDR	Cost Centre D1101001990	<input type="checkbox"/> Declaration of Missing Documentations completed? ?
Conference Remaining Allowance 2,500.00	Consumables Remaining Allowance 1,183.72	Status	
<input type="button" value="Save"/> <input type="button" value="Itemize"/> <input type="button" value="Allocate"/> <input type="button" value="Attach Receipt"/> <input type="button" value="Cancel"/>			

Complete all details. Ensure that payment type **HDR Conference Support** is selected, if the expense falls under the Conference category.

Attaching Receipt



Attach the receipts by selecting on the expense, and then click [Attach Receipt](#) on the right-hand corner of your Concur screen. The system will prevent you from submitting the report if no receipt has been attached.



Alternatively, you can drag and drop receipts from your computer directly onto the expense. Simply open a folder on your computer, and drag the document onto the expense. Ensure that you position your mouse directly above the expense.

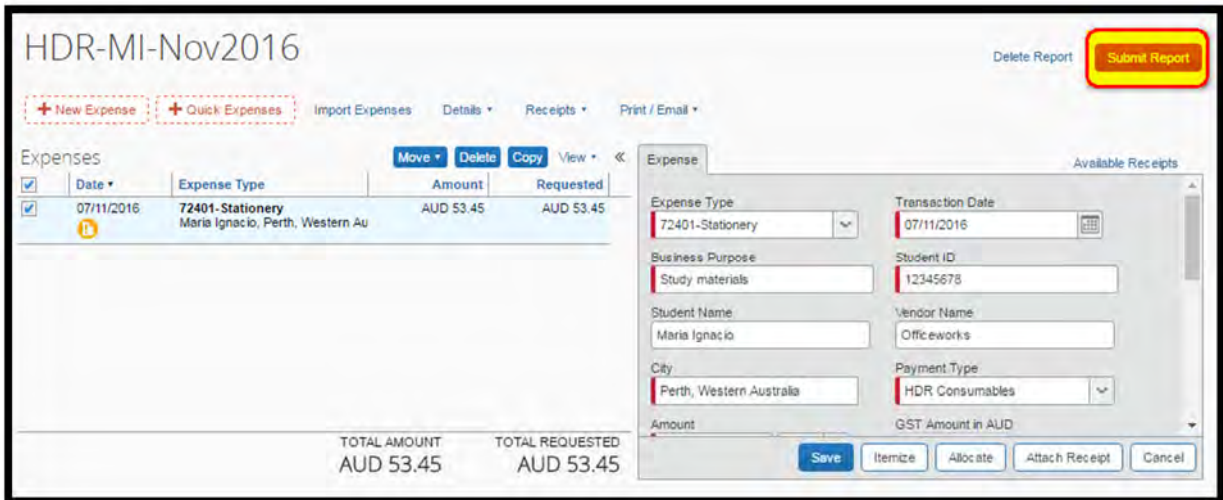
Please note that this function is only available on Mozilla Firefox or Google Chrome.



The sign will appear below the expense date once your receipt has been successfully uploaded. If you point your mouse over the icon, you can view the receipt which you have uploaded.


Submitting Report

Once you have finished entering all of your expenses, click [Submit Report](#) located on the right side of your report.



The screenshot shows the 'HDR-MI-Nov2016' report interface. At the top right, there is a 'Delete Report' button and a 'Submit Report' button highlighted with a red border. Below the title, there are navigation options: '+ New Expense', '+ Quick Expenses', 'Import Expenses', 'Details', 'Receipts', and 'Print / Email'. The main area displays a table of expenses with columns for 'Date', 'Expense Type', 'Amount', and 'Requested'. A single expense is listed: '07/11/2016', '72401-Stationery', 'AUD 53.45', and 'AUD 53.45'. To the right of the table is a form for editing the selected expense, with fields for 'Expense Type', 'Transaction Date', 'Business Purpose', 'Student ID', 'Student Name', 'Vendor Name', 'City', 'Payment Type', and 'Amount'. At the bottom of the form are buttons for 'Save', 'Itemize', 'Allocate', 'Attach Receipt', and 'Cancel'. The bottom of the interface shows 'TOTAL AMOUNT AUD 53.45' and 'TOTAL REQUESTED AUD 53.45'.

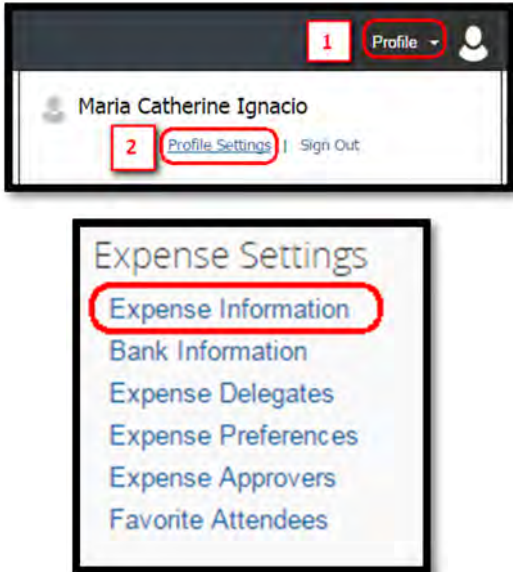
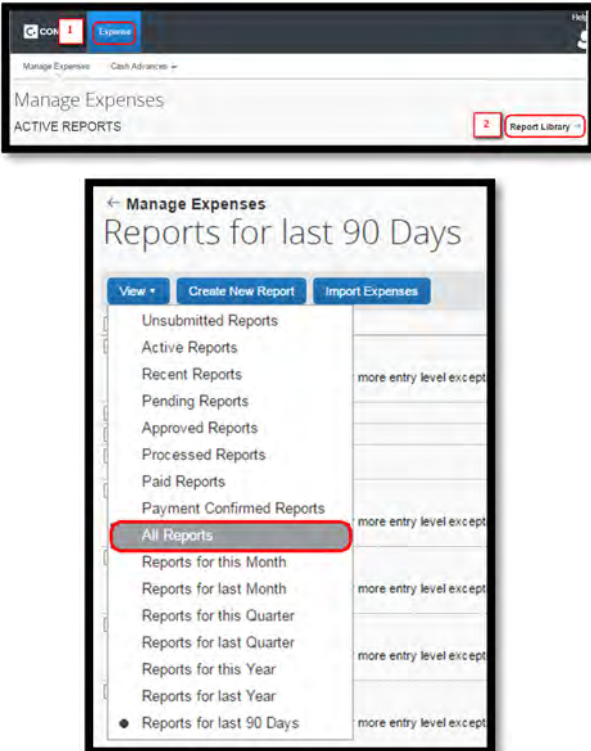
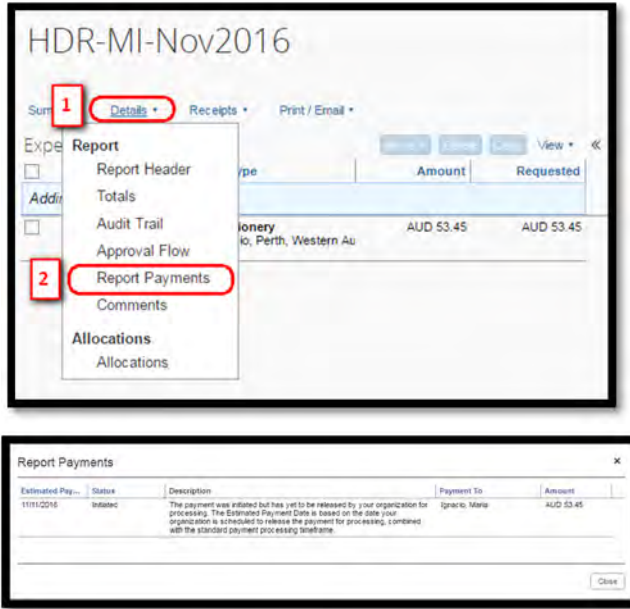
Click [Submit Report](#) again.



The screenshot shows a 'Final Review' dialog box. The title bar says 'Final Review'. Inside the dialog, there is a section titled 'Report Submit Confirmation' with the text 'Are you sure you want to submit this report?'. At the bottom right of the dialog are two buttons: 'Submit Report' and 'Cancel'.

If your report has been successfully submitted, the report status will appear as per the following screenshot.

Frequently Asked Questions

Q: How to view my current balances?	Q: How to review previous reports?	Q: How to track the status of an approved report?
<p>A: Go to "Profile". Click "Profile Settings" Choose "Expense Information" under Expense Settings.</p>	<p>A: Go to "Expense" tab. Click "Report Library". Change View filter to "All Reports"</p>	<p>A: Open the report. Go to "Details". Choose "Report Payments."</p>
		



Concur Homepage

Administration | Help

CONCUR Expense Reporting App Center Profile

Curtin University Hello, Maria

+ Start a Report	+ Cash Advance	+ Upload Receipts	02 Available Expenses	01 Open Reports	00 Cash Advances
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COMPANY NOTES

Concur is an expense management system used by Curtin University to manage HDR student reimbursement claims.

GUIDES
TRAVEL
FAQ

Please find below the relevant guides:

- [Reimbursable Items Listing](#)
- [Concur User Guide](#)
- [Concur App Guide](#)

Travel must be booked via the **University Travel Facilitator** and the student must include the receipt and approved copy of the **Conference Support Application, or relevant form.**

Please find below some travel related forms:

- [Travel Guidelines](#)
- [Travel Approval Form](#)
- [Conference Support Form](#)

For other relevant policies and procedures for Higher Degree by Research Students, please visit [Research at Curtin website](#).

To view your current balances:
Go to "Profile" >> "Profile Settings" >> "Expense Information"

To review your previous reports:
Click "Expense" tab >> "Report Library"

To track your payment status:
Go to your approved report >> "Details" >> "Report Payments"

CONTACTS

For matters related to HDR processes, candidacy, leave of absences, changes to thesis titles or thesis committees, Chairperson's report, and thesis extensions, kindly contact Graduate Research School via email: GRS.CurrentStudents@curtin.edu.au or call +61 8 9266 3337.

Contact our Concur Helpdesk team via email: ConcurHelpdesk@curtin.edu.au or call +61 8 9266 2319, if you need assistance with Concur settings.



Curtin University

HDR

CONTACTS

Graduate Research School

GRS.CurrentStudents@curtin.edu.au
(08) 9266 3337

Concur Helpdesk

ConcurHelpdesk@curtin.edu.au
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