



Curtin University

POSTGRAD RESEARCH CONCUR CASH ADVANCE RECS 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 cash advance request.

Make tomorrow better.

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Introduction

Concur is an expense management system used by Curtin University to manage HDR student reimbursement claims. This guide describes the Cash Advance feature available for HDR Students.

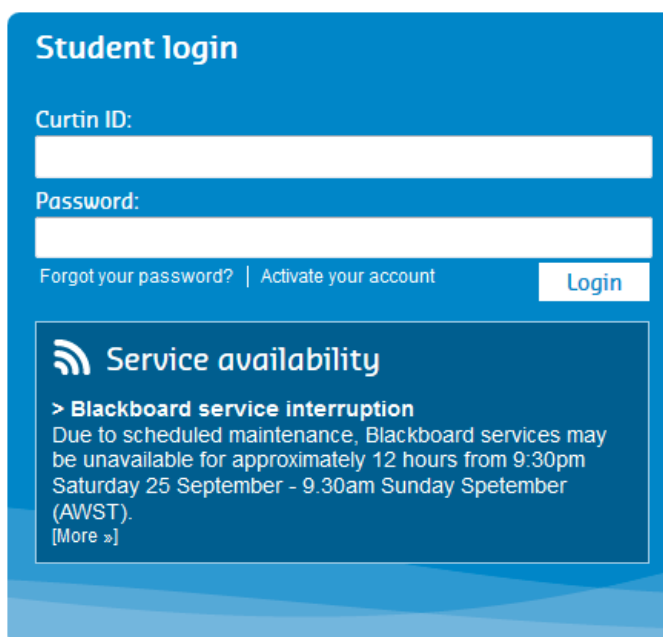
Access Concur

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 has a blue header with the title 'Student login'. Below the header, there are two input fields: 'Curtin ID:' and 'Password:'. To the right of the password field are two links: 'Forgot your password?' and 'Activate your account', and a 'Login' button. Below the login fields is a 'Service availability' section with a Wi-Fi icon. It contains a heading '> Blackboard service interruption' and a paragraph: '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

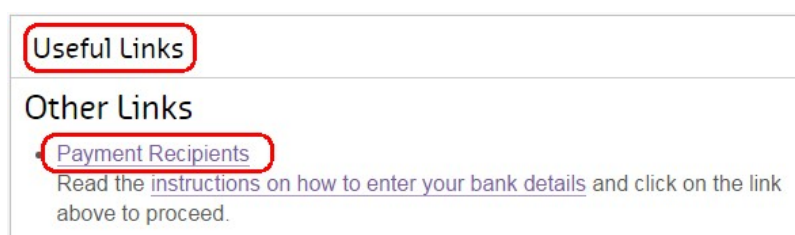
Click [My Studies](#) tab as shown in the screenshot



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.

Cash Advance Reconciliation

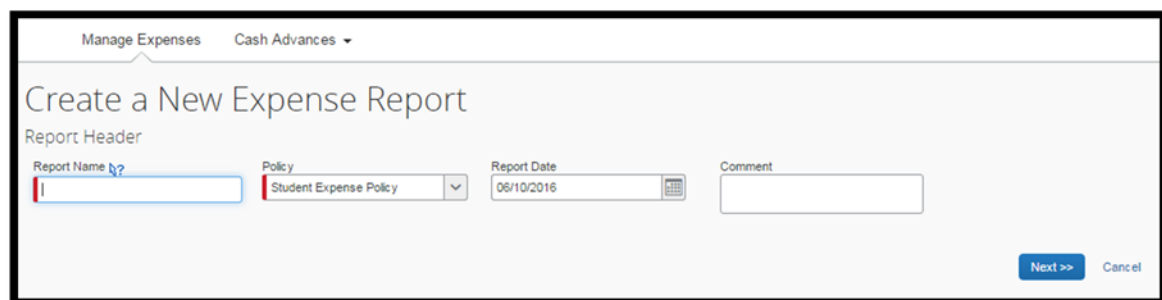
Creating a Report

Step One:



Click [Start a Report](#) from your Concur Header. Refer to the red box above.

Step Two:

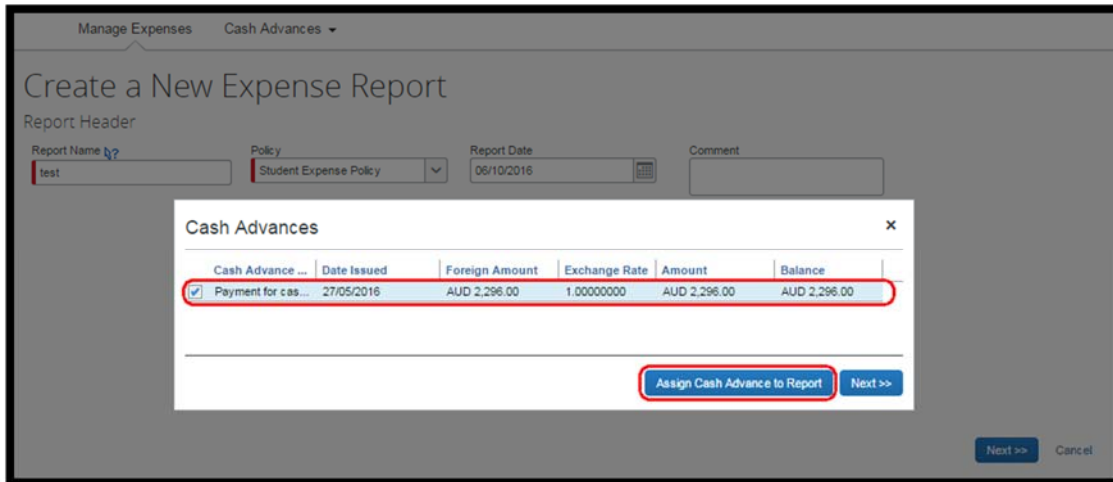


The screenshot shows the 'Create a New Expense Report' form. The form has a header section with 'Manage Expenses' and 'Cash Advances' tabs. Below the header, there are four input fields: 'Report Name' (with a red vertical bar on the left), 'Policy' (a dropdown menu showing 'Student Expense Policy'), 'Report Date' (a date field showing '06/10/2016'), and 'Comment' (a text area). At the bottom right, there are 'Next >>' and 'Cancel' buttons.

Create a New Expense Report

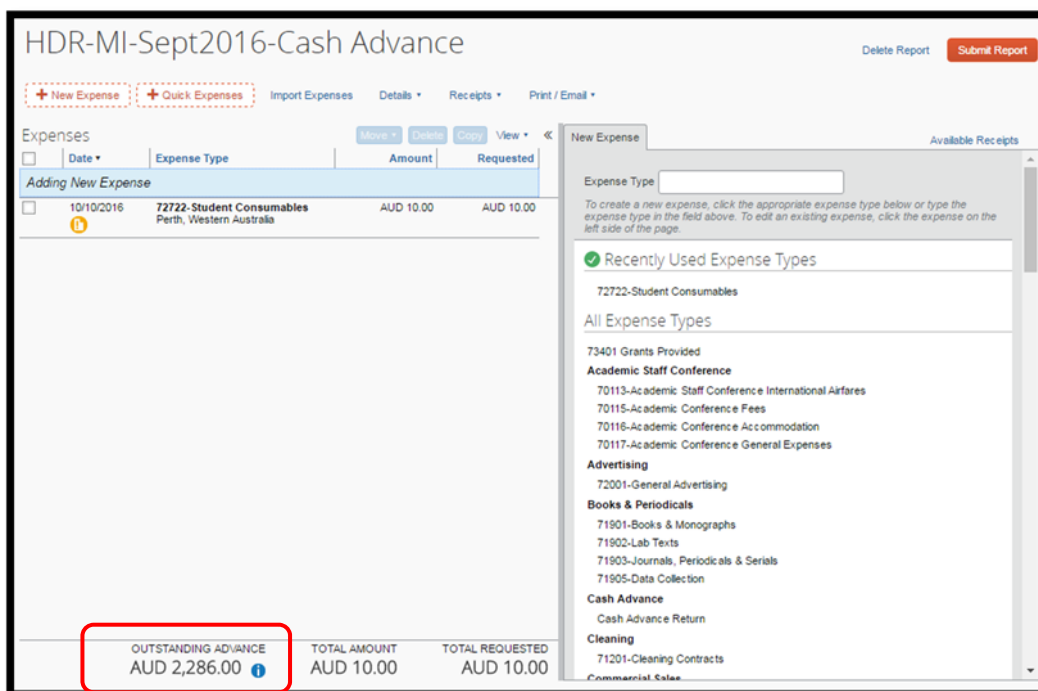
Report Name	HDR + "Your Initials" + Month/Year + Cash Advance Example: HDR-MI-Sept2016-Cash Advance
Policy	Student Expense Policy
Report Date	Use default date
Comment	Add any further information in this box.

Assigning a Cash Advance Step Three:



A pop up window will appear, highlighting all available cash advances. Click on the cash advance, and then [Assign Cash Advance to Report](#). Any cash advances withdrawn in a different currency will have the foreign currency amount and the conversion rate.

Step Four:



Once you have attached your cash advance(s) you can create cash expenses to represent the transactions that you have made with the cash advance.

[Outstanding Advance](#) on highlights the remainder of the cash advance that will need to be reconciled or returned to the University.

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.

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

☒ Is GST Included in Invoice?

Comment:

Division: HDR

Cost Centre: D1101001990

☐ Declaration of Missing Documentations completed? [?](#)

Conference Remaining Allowance: 2,500.00

Consumables Remaining Allowance: 1,183.72

Status:

[Save](#) [Itemize](#) [Allocate](#) [Attach Receipt](#) [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

☒ Is GST Included in Invoice?

Comment:

Division: HDR

Cost Centre: D1101001990

☐ Declaration of Missing Documentations completed? [?](#)

Conference Remaining Allowance: 2,500.00

Consumables Remaining Allowance: 1,183.72

Status:

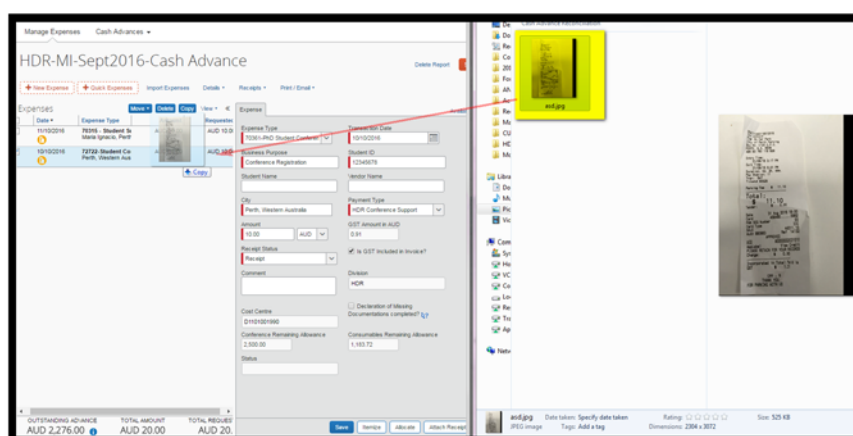
[Save](#) [Itemize](#) [Allocate](#) [Attach Receipt](#) [Cancel](#)

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.

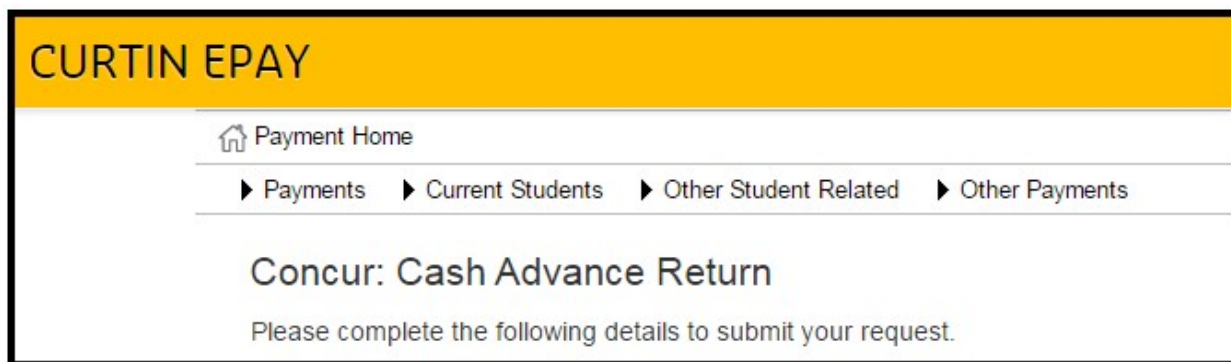
Please note that in order to submit the report, the entire cash advance must be used, i.e. Outstanding Advance must be 0.

If you have made a cash advance withdrawal through Concur, you are required to acquit (clear) your outstanding cash advance(s) before you can process any reimbursement report and before the sanction can be lifted.

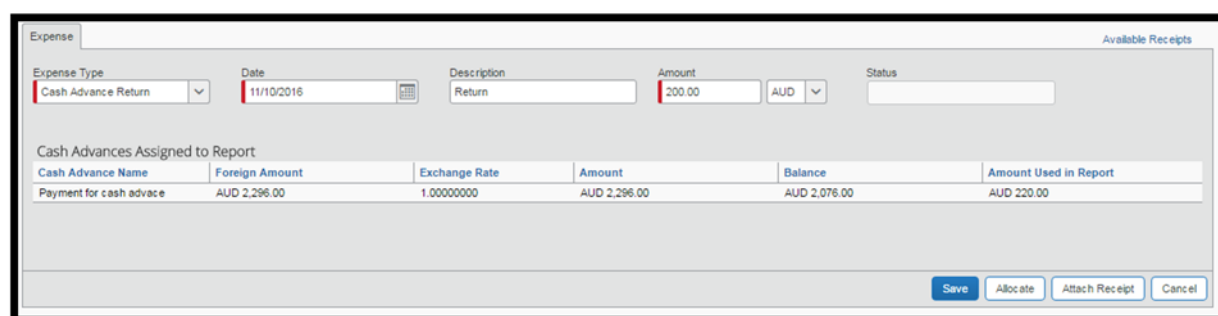
Cash Advance Return

If for some reason you did not consumed all the money, the remaining funds will be return back to Curtin. Please find the link below on how to return cash advance:

<https://payments.curtin.edu.au/onestopweb/home/menu>



Complete all details. Please use the [Cash Advance Return](#) for the Expense Type.



Cash Advance Name	Foreign Amount	Exchange Rate	Amount	Balance	Amount Used in Report
Payment for cash advance	AUD 2,296.00	1.00000000	AUD 2,296.00	AUD 2,076.00	AUD 220.00

Category	Suggested Expense Type Selection
Cash Advance Return	Cash Advance Return



Curtin University

HDR

CONTACTS

Graduate Research School

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

Concur Helpdesk

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(08) 9266 2319

