

How-to Create a guest profile in Concur for non-employees

for non-travel reimbursements &

travel pre-approval > travel booking > travel expense reporting & reimbursement

How are Concur Profiles Created?

For all UNT System Enterprise **Employees**, profiles in Concur are automatically created from the HR system with a valid HR record.

Profiles for non-employees (Students, prospective employees, other non-employee guests) have to be manually created by the UNT System Concur Team. Non-employees will not be able to access Concur. A full-time UNT System employee must be designated as the guest's sponsor that will create and submit reimbursement Expense Reports and Travel on the guest's behalf.

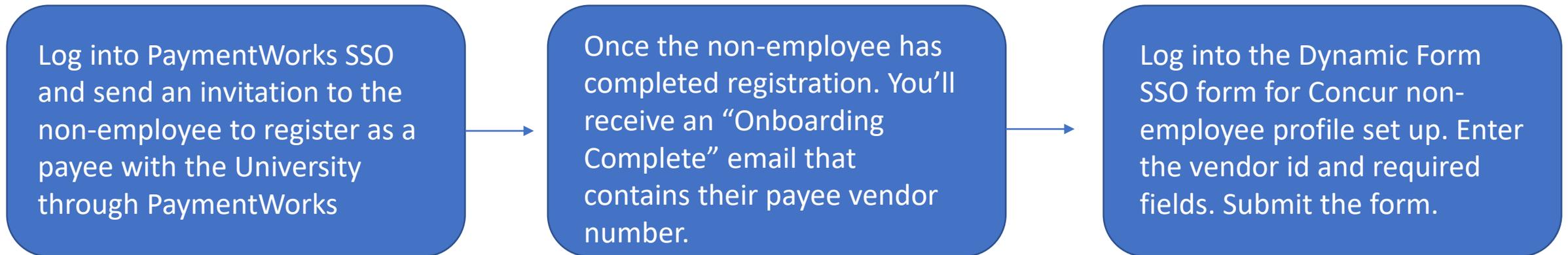
Having non-employee reimbursements and travel processed in Concur helps provide a consistent process for all reimbursements and travel.

Note: Some students may be employed by the University in some capacity. A profile will already be available and the only action would be to set up a sponsor as a delegate.

How are Concur Profiles Created?

High Level Process Steps.

*Steps 1 & 2 are not necessary if a profile is **only needed to book travel** and there will not be any reimbursements. Concur reimbursement requirements can be sent after booking travel if necessary.*



Once the UNT System Concur team creates the profile, you'll receive a completion notification from Dynamic Forms and you can begin working as a delegate in the non-employee's profile

How do I get a non-employee Concur Profile set up?

1. If there will be a reimbursement, the guest's sponsor will send an invitation for [PaymentWorks](#) so that the guest can enter their banking info securely. Once the guest has completed PaymentWorks registration, the sponsor will receive a "Payee Onboarding Complete" email that contains a vendor number. More information on PaymentWorks found at <https://dev--finance.untsystem.edu/procurement/marketplace/supplier-management.php>
2. Complete the Non-Employee Concur Profile setup form located @ https://finance.untsystem.edu/travel/concur_non-employee_profiles.php - An automatic notification will be sent when the profile has been set up and ready to access.

Note: only complete step two if the profile is only needed to book travel in Concur

F.A.Q.

Q: How long does it take to create a non-employee profile in Concur?

A: Depending on the type of non-employee profile being created, the profile should be completed within 1-3 business days once the form has been submitted

Q: How does the non-employee get their reimbursements paid?

A: An Accounts Payable Supplier Record is created when the non-employee registers with PaymentWorks. Payments are paid electronically via EFT.

Q: What does the workflow look like in Concur?

A: The sponsor will create and submit the Expense Report/Request > Budget approver > Accounting Review > Payment.

Specific Trip Types must be used on the Concur Request or Expense Type for the workflow to route correctly. There are 8 Trip Types.

Use:

6. Student Reimb./Travel
7. Prospective Employee Reimb./Travel
8. Other Non-Employee Guest Reimb./Travel

Q: What about student travel for those students that are also employees?

A: Those students that are also employees will already have a Concur profile. The sponsor will be set up as a delegate to create the student reimbursement. The sponsor should use the Concur Trip Type “6. Student Reimb./Travel” so that the workflow routes correctly and does not involve the student employee’s supervisor.

Q: The non-employee does not want to enter their banking information into the system. Can we just pay them some other way?

A: All individuals and vendors that wish to be paid from the UNT System must register as a vendor in PaymentWorks and provide banking information for electronic payment. The UNT System no longer issues paper checks.