

# Concur Travel and Expense Set-up Check List

**Sign into Concur** <https://concur solutions.com>

Your User Name is your [RCS ID@rpi.edu](mailto:RCS ID@rpi.edu) (ex. rochmp2@rpi.edu)

The first time in, you will need to select “forgot password”. Choose the option to receive an emailed link to the Change Password page.

## Home Tab

### In the Alerts box

- Activate your **TriplIt Pro** Subscription
- Sign up to receive **E-Receipts**

## Profile Settings (found by clicking on the Profile drop-down arrow at upper right-hand corner of page)

### In the Your Information Section

- Review your name. It should be your **legal name** that is required for airline travel. This name will show on any tickets purchased. If it is not your legal name that is shown, it needs to be changed. Please contact Christopher Thorne. You will also be required to enter a middle initial or check the box indicating “no middle name.”
- Enter your **birth date and gender**.
- \*\*Verify Email Address (for Receipt Store)\*\***  
Each e-mail address can ONLY BE IN THE SYSTEM ONE-TIME! Do NOT enter anyone else’s e-mail address as that will prevent that individual from being able to establish their own receipt store with their e-mail address.
  - To e-mail a receipt into your Concur account you must send the e-mail to [receipts@concur.com](mailto:receipts@concur.com). You MUST send the attachments to this e-mail address from one of the e-mail address in your profile.
- We recommend you do not enter any personal credit card information into Concur.**

### In the Travel Settings Section

- Assistants and Travel Arrangers**  
If you have someone that arranges travel on your behalf you must add an Assistant to your profile. Adding an assistant will allow that person to book your travel for you. Click on “+ Add an Assistant”. Then search for an RPI employee. Check “Can book travel for me”. The system allows for you to have more than one Assistant.

### In the Expense Settings Section

- Expense Information**  
We have loaded a default FOAPAL for every employee, however, you have the ability to update the default FOAPAL if necessary. You also have the ability to change this FOAPAL with every expense that you submit. Please review the information shown and if you have questions about whether the FOAPAL is accurate, please contact your department Business Manager.
- Banking Information**  
You have the ability to change your Banking information in your Profile at any time. You are the only person that can see this information. If you have not already signed up for direct deposit we recommend that you do so. If you wish to sign up now please complete the Concur Direct Deposit Authorization Form posted on the Finance web site and submit it to Disbursements. Once received, your profile will be set so that Disbursements can enter your banking information or you can enter your banking information. You will indicate your preference on the form. Once the banking information is loaded it will need to be verified (3-5 days.) When that is complete you will be able to submit a report and be reimbursed directly into your account.
- Expense Delegates**  
If someone else prepares your expense reports for you, you MUST assign that individual as your Expense Delegate. The system allows you to have more than one.
  - Search for the employee that you would like to assign as your expense delegate.

- You must select the “Can Prepare” box to allow your delegate access.
- If your delegate wants to receive e-mails about your expense reports then you must select the “Receives Emails” box.
- The delegate can **ONLY PREPARE** your expense report. You MUST still review and submit the expense report. No one can be assigned to do that for you.
- The delegate cannot see any of your personal information in your profile.

**Expense Approvers**

This individual will approve the business purpose of all reports that you submit. The supervisor was reviewed and assigned by your Portfolio Business Manager. If you think it needs to be changed, please contact your Portfolio Business Manager. If a change is needed the PBM will make a request to the Disbursements Office (Christopher Thorne).

**Favorite Attendees**

Per Institute policy business meals/entertainment expenses require a list of all attendees associated with the expense. Entering attendees that you meet with regularly will speed up the processing of expense reports. You can do this now or at a future date if you wish.

**In the Other Settings Section**

**Mobile Registration**

You can use Concur on your Mobile Device (Blackberry, Android, iPhone, iPad) to assist with your Travel and Expense needs. Among other things – you can enter out-of-pocket expenses real-time and take a picture of your receipt; create, edit, and submit your expense reports; and complete your expense approvals. You can check your itinerary; book a taxi, rental car, or hotel; and view the map.

- In order to complete the set up you must first create a Mobile PIN
- Concur will then e-mail you an activation code that needs to be entered to complete the registration
- Follow directions on the e-mail to activate
- The Concur app will then need to be downloaded on your mobile device. Your login and pin can be used to access your account via the app.

**Need Help?**

Questions specific to Concur functionality? Call the Concur help desk at (877) 812-5060 (Travel)/(877) 901-4960 (Expense) or go to the Home page in Concur and click Contact Support in the lower right corner. For questions specific to Rensselaer policy or procedures, contact Christopher Thorne at extension 2395 or by email at [thornc3@rpi.edu](mailto:thornc3@rpi.edu). Refer to the Finance Web site <http://finance/rpi.edu> Navigation: Business Administrators & Employees – Training and Presentations – Travel and Expense

**Hotel – Paid on Rensselaer’s account**

Upon checking into a hotel you should tell them that they should have received a fax from Rensselaer with credit card information to settle the charges. If the hotel staff cannot find the payment information, have them contact the travel agency or contact the travel agency yourself to have them re-send the credit card information.

**Carry this information with you when traveling:**

