



Rensselaer

Concur®

Frequently Asked Questions

General

Q: Where can I find more information about the Concur system?

A: **Forms, Policies, and Procedures:** <http://finance.rpi.edu/update.do?catcenterkey=148>

Training & Presentations: <http://finance.rpi.edu/update.do?catcenterkey=142>

Travel

Q: What is the best method for booking international travel?

A: **Concur Travel is a premier corporate online booking tool (companies such as Pepsi, Nike, etc. use it) and its strength lies in domestic itineraries. Due to the complexity of international faring, routing, and rules, it is recommended that International travel be booked by CAT and their dedicated travel agents. CAT supports the Concur Travel & Expense system and the reservations they book will feed into Concur.**

Q: How should Amtrak bookings be handled?

A: **Amtrak train travel is expected to be booked either online through Concur or with CAT, with a few exceptions. The online system through Concur is set up as a direct connect with Amtrak, so that when an online reservation is processed it goes directly to Amtrak to make the reservation. In the case of an extreme emergency booking, the traveler can use their personal credit card to book the ticket on the day of travel within 1 hour of departure and will be reimbursed. *Please see the Finance website for more information.***

Q: What if I have a trip that combines BOTH RPI and NON-RPI business?

A: Call the travel agency to make the reservation. Your business part of the reservation will be charged to the Institute. You will need to provide a credit card for the personal portion of the reservation. If staying at a hotel and there is a personal expense such as a movie, the e-folio will automatically feed the line item detail into your expense report. You would mark the movie charge as a personal expense.

Q: Can we approve the seat assignment?

A: The agency will have your seat preferences in your profile and will always review the seats with the traveler before processing the booking. You also will have the option to select your seat if booking online through Concur.

Q: I travel by Southwest to save money. However, I pay them to get the "A" number assignment so that I am likely to get a good seat. I assume that the new system will allow me to do this.

A: Yes, this is allowable.

Q: What if I need to make changes during the travel. Do I need to go through the agent? Esp. late at night etc.?

A: There are multiple options to deal with this situation:

- 1. The recommended option would be to call the travel agency using their 24 hour service if it is after hours.**
- 2. You can also speak with the agent at the ticket counter, however if you choose this option and there are additional charges, you will need to provide out of pocket payment and then be reimbursed.**
- 3. A third option would be to go onto Concur.com and book another flight online, however you need to be cautious of the amount of time between the booking and the actual flight.**

Q: If my flight gets delayed or canceled can I talk directly to the airline to reschedule it or do I have to talk to reservation agency like is the case with making online reservations through Expedia, Orbit, etc.?

A: You can talk directly to the airline ticket agent. The difference with Concur is that when you book your travel online using Concur the ticket is ultimately fulfilled by the travel agency (CAT). Therefore, the airlines recognize the ticket as having been booked by an agency.

Q: What if I am not sure which grant I might charge the travel to because it involves work on a few different grants.

A: This information is not required when booking travel. This determination only needs to be made when the expense report is being completed and submitted.

Q: I have been using X-airline as a preferred airline. May I continue to use it?

A: Yes, however, the policy will continue to require you to choose the most economical and efficient use of Institute funds.

Q: I used similar reservation system in my travel for NSF. They are much more expensive because they only book refundable tickets which are more expensive than the non-refundable tickets I usually buy. May I continue to buy non-refundable tickets?

A: Yes, the agency predominantly books non-refundable tickets.

Q: How is a trip with multiple destinations managed?

A: Concur Travel allows for booking trips with multiple destinations.

Q: How is a trip with spouse accommodated?

A: Trip must be booked through CAT (travel agency); spouse's portion of the trip will be charged to a personal credit card

Q: What if room and board is charged as part of a package deal associated with a conference?

A: You can call the travel agency (CAT) and they will try to book the package deal on your behalf. If booked by CAT, any airfare and hotel expenses will be charged to the Institute's virtual card. Alternatively, payment will have to be made with a personal credit card and the expense submitted for reimbursement.

Q: What if there is an unexpected additional hotel stay during a trip and circumstances prevent the use of the Institute's virtual card (P-log)?

A: Payment will have to be made with a personal credit card and the expense submitted for reimbursement.

Q: What if a sponsor/league mandates the use of a travel agency other than CAT?

A: The traveler is free to use the travel agency specified by the sponsor/league.

Q: Can a traveler book first-class airfare in the rare instance that the cost is actually cheaper than an economy-class ticket?

A: Yes, but documentation must be provided illustrating that it was indeed cheaper to book first class than economy class.

Q: Will the Southwest Pre-Check/Early Bird Payment be covered on the AirPlus card?

A: Yes

Q: Will travelers be allowed to book a hotel at an advance purchase rate?

A: Yes.

Q: Who determines the hotel star ratings?

A: Northstar

Q: Expedia offers upgrade notifications when booking airline tickets. i.e. upgrade from Economy class to Business class for a \$20.00 fee. Does Concur have this capability?

A: Yes, Concur Travel does have this capability.

Q: Does Concur have the capability to book rail tickets other than Amtrak and VIA?

A: Yes. Concur can book tickets for Eurostar, a high-speed railway passenger train service in Western Europe. You will not see Eurostar within the Rail Tab; it is available for booking in the Air/Rail tab. Rail stations will appear in the airport list for available cities.

Q: Can a travel arranger email a "draft" itinerary to a traveler for review and selection?

A: Yes, there are two options: (1) you can select the "PRINT or EMAIL" button at the top of the page on the "available flights" page for the traveler to select and review, OR (2) you can go through the booking tool, and instead of Reserving the trip, you can HOLD the trip and send it to the traveler for review.

Q: Does a traveler have to purchase insurance from Enterprise/National when renting a car in a foreign country (outside of the US, Canada, and Mexico?)

A: Yes.

Expense

Q: What if a traveler obtains an exchange rate when traveling that is different than the rate provided in Concur; how will this be handled?

A: Key in the rate acquired while traveling into the conversion calculator and attach documentation of rate used before submitting the expense report; report could be subject to audit

Q: Are hotels paid out-of-pocket allowed?

A: It is required to book hotels using Concur or the Travel Agency. If paid out-of-pocket, you will receive a warning message in Concur Expense. You must document the reason why Concur or the Agency was not used and the report may be subject to audit.

Q: What happens when an expense report is submitted against a fund that has gone NSF (non-sufficient funds)?

A: The expense will post to the fund.

Q: Mileage on weekends/non-business hours; what is the appropriate, reportable mileage?

A: Report actual mileage from your normal place of business or home (whichever is the lesser).

Q: In the list of un-expensed credit card transactions, what date appears next to the charge?

A: The date the transaction cleared the bank.

Q: What date should be used for the Hotel Expense transaction date?

A: This should be the date of check-out for currency conversion reasons.

Q: Can two non-submitted expense reports be combined into one?

A: No. A user will need to delete one expense report, the expenses would then flow back into your receipt store, and you can then add the expenses to a different expense report

Q: If a traveler is not signed up for ACH payments, where will the check go? Personal or Work address?

A: The check will be mailed to the traveler's Permanent Address.

Q: Is there a way to save frequently used FOAPAL allocations?

A: Yes. When allocating an expense at the line or report level, you can save a FOAPAL allocation as a "Favorite", giving it a name, so that you can select it the next time you do an expense report.

Q: Why do I get a “red” exception when I pull an air, rail, or hotel reservation into an expense report?

A: The associated Rensselaer corporate account charge has not come into the system and synched up with the reservation in the traveler’s “Smart Expenses”. Until that happens (or if the reservation was ultimately paid for out-of-pocket), do not pull the reservation into an expense report.

Reimbursement/Settlement

Q: When will my direct deposit reimbursement hit my bank?

A: About 4 business days after all approvals have been obtained. You will receive an e-mail from Concur notifying you of the projected deposit date.

Q: I have chosen not to have direct deposit when can I expect my reimbursement check?

A: You will receive your reimbursement check approximately 10 business days after all approvals have been obtained. Your reimbursement check will be mailed to your permanent address in the Banner system.

Q: What if, upon completing an expense report, the traveler owes RPI?

A: The traveler must send a check, made payable to RPI, to the Travel Office, Rice Building 5th Floor along with a hard copy of the expense report. To obtain a hard copy; view the expense report, click on the tab “Print/Email”, select “Expense Detailed Report”, then print. Please write the FOAPAL you would like the money deposited into.

Travel/Expense

Q: Can Travel Assistants and Expense Delegates see the personal profile info (i.e. banking information) of the person for which they are administering travel?

A: No

Q: Is Concur MAC compatible?

A: Yes

Q: How do I deal with any banking deposit issues?

A: If there is a dispute regarding an incorrect amount deposited into a travelers account, the traveler will work directly with Rensselaer. Rensselaer in-turn will work with Concur to address any issues. Also, Concur will never withdraw funds from a traveler's personal bank account.

Policy

Q: We have an active seminar series, faculty interviews who are guests. Will they be required to use the system?

A: No. However, if a Rensselaer representative wishes to book the travel or complete an expense report for out-of-pocket reimbursable expenses for the guest they will have to request permission by completing a Concur Authorization Form – Visitors. This form can be found on the Finance web site at finance.rpi.edu.

Q: Will the Fly America Act waiver form (paper document) still be required by Research Administration & Finance?

A: No. RA&F will utilize Concur reporting to review non-fly America act flights.