CONCUR IS:

1. An expense reporting tool
2. A web-based travel booking and reporting tool
SETTING UP YOUR PROFILE
ACCESS CONCUR AT CONCUR.SOLUTIONS.COM
netid@rice.edu
Click “forgot password”
SETTING UP YOUR PROFILE

Profile Options

Select one of the following to customize your user profile.

**Personal Information**
Your home address and emergency contact information.

**Company Information**
Your company name and business address or your remote location address.

**Credit Card Information**
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

**E-Receipt Activation**
Enable e-receipts to automatically receive electronic receipts from participating vendors.

**Travel Vacation Reassignment**
Going to be out of the office? Configure your backup travel manager.

**Expense Delegates**
Delegates are employees who are allowed to perform work on behalf of other employees.

**Change Password**
Change your password.

**System Settings**
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

**Contact Information**
How can we contact you about your travel arrangements?

**Setup Travel Assistants**
You can allow other people within your companies to book trips and enter expenses for you.

**Travel Profile Options**
Carrier, Hotel, Rental Car and other travel-related preferences.

**Bank Information**
Bank Information

**Expense Preferences**
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

**Mobile Registration**
Set up access to Concur on your mobile device.
Optionally, add seat preferences, preferred airport, special needs, and even frequent flyer numbers.
Set up your delegates

### Expense Delegates

<table>
<thead>
<tr>
<th>Delegates</th>
<th>Delegate For</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>Save</td>
</tr>
</tbody>
</table>

Delegates are employees who are allowed to perform work on behalf of other employees.

- **Hughes, Jon**
  - jon.r.hughes@rice.edu
  - Can Prepare: **✓**
  - Can Submit Reports: **✓**
  - Can View Receipts: **✓**
  - Receives Emails: **✓**
  - Can Approve: **✓**
  - Can Approve Temporary: **✓**
  - Can Preview For Approver: **✓**
  - Receives Approval Emails: **✓**

- **Salgado, Maria**
  - Maria.Salgado@rice.edu
  - Can Prepare: **✓**
  - Can Submit Reports: **✓**
  - Can View Receipts: **✓**
  - Receives Emails: **✓**
  - Can Approve: **✓**
  - Can Approve Temporary: **✓**
  - Can Preview For Approver: **✓**
  - Receives Approval Emails: **✓**

- **Windish, Barbara**
  - barbara.l.windish@rice.edu
  - Can Prepare: **✓**
  - Can Submit Reports: **✓**
  - Can View Receipts: **✓**
  - Receives Emails: **✓**
  - Can Approve: **✓**
  - Can Approve Temporary: **✓**
  - Can Preview For Approver: **✓**
  - Receives Approval Emails: **✓**
Set up your approver

Expense Approvers

Your Information
- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings
- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Expense Settings
- Expense Information
- Bank Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Favorite Attendees

Other Settings
- E-Receipt Activation
- System Settings
- Connected Apps
- Concur Connect
- Change Password
- Travel Vacation Reassignment
- Concur Mobile Registration
NON-TRAVEL EXPENSES
NON-TRAVEL EXPENSES

Report naming:
Last name_month_year_expensetype
## NON-TRAVEL EXPENSES

Add your expenses

Select expense type
Complete all information
Attach itemized receipt
Exclude sales tax

<table>
<thead>
<tr>
<th>New Expense</th>
<th>Quick Expenses</th>
<th>Import Expenses</th>
<th>Details</th>
<th>Receipts</th>
<th>Print / Email</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Shelton_Aug_Sept_2019_BME</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### New Expense

<table>
<thead>
<tr>
<th>Expense Types</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01. Supplies and Office Expenses</td>
<td>ADA Supplies and expenses - 70161</td>
</tr>
<tr>
<td></td>
<td>Awards/Supplies - 70358</td>
</tr>
<tr>
<td></td>
<td>Computer Hardware - 70490</td>
</tr>
<tr>
<td></td>
<td>Event Supplies - 70685</td>
</tr>
<tr>
<td></td>
<td>Freight and Shipping Expenses - 70390</td>
</tr>
<tr>
<td></td>
<td>Freight Merchandise for Remote Office - 70266</td>
</tr>
<tr>
<td></td>
<td>Dining and Lodging Expense - 70440</td>
</tr>
<tr>
<td></td>
<td>Medical Supplies - 72006</td>
</tr>
<tr>
<td></td>
<td>Office/Mailroom Items Not For Retail - 71649</td>
</tr>
<tr>
<td></td>
<td>Supplies Chemicals - 72179</td>
</tr>
<tr>
<td></td>
<td>Supplies Office - 72190</td>
</tr>
<tr>
<td></td>
<td>Supplies - 72200</td>
</tr>
<tr>
<td></td>
<td>Uniform Expenses - 73081</td>
</tr>
<tr>
<td>02. Printing, Advertising &amp; Marketing</td>
<td>Advertising Employment - 70190</td>
</tr>
<tr>
<td></td>
<td>Advertising Expenses - 70120</td>
</tr>
<tr>
<td></td>
<td>Advertising Public Relations - 70130</td>
</tr>
<tr>
<td></td>
<td>Advertising Marketing - 73090</td>
</tr>
<tr>
<td></td>
<td>Printing and Photocopying - 71720</td>
</tr>
<tr>
<td></td>
<td>Promotional Items - 71750</td>
</tr>
<tr>
<td></td>
<td>Publication Costs - 71740</td>
</tr>
<tr>
<td></td>
<td>Sign and Services - 70150</td>
</tr>
<tr>
<td>03. Equipment &amp; Maintenance</td>
<td>Computer Equipment under $5000 - 70420</td>
</tr>
<tr>
<td></td>
<td>Copiers under $5000 - 70422</td>
</tr>
<tr>
<td></td>
<td>Mail Cont &amp; Non Computer Equip - 70550</td>
</tr>
<tr>
<td></td>
<td>Non-Computer Equipment under $5000 - 70540</td>
</tr>
<tr>
<td>04. Technology &amp; Telecommunications</td>
<td>Computer Related Equip Under $5000 - 70490</td>
</tr>
<tr>
<td></td>
<td>Computer Usage - 70830</td>
</tr>
<tr>
<td></td>
<td>Computer Usage Costs - 70860</td>
</tr>
<tr>
<td></td>
<td>Desktop Comp Med Use under $5000 - 70491</td>
</tr>
<tr>
<td></td>
<td>Laptop Comp Med Use under $5000 - 70490</td>
</tr>
<tr>
<td></td>
<td>Mobile/Cellular Phone - 70425</td>
</tr>
<tr>
<td></td>
<td>Network Access Charges - 70450</td>
</tr>
<tr>
<td></td>
<td>Printer under $5000 - 70451</td>
</tr>
<tr>
<td></td>
<td>Purchase Long Distance Service - 78300</td>
</tr>
<tr>
<td></td>
<td>Software Applications under $5000 - 70510</td>
</tr>
<tr>
<td></td>
<td>Software Hrt Exp Med Use - 70511</td>
</tr>
<tr>
<td></td>
<td>Software Dev/Software - 78020</td>
</tr>
<tr>
<td></td>
<td>Telecommunication Line Charges - 70410</td>
</tr>
<tr>
<td></td>
<td>Telephone Charges: Long Distance - 70420</td>
</tr>
<tr>
<td></td>
<td>Telephone Wireless Service - 70425</td>
</tr>
<tr>
<td></td>
<td>Website Design Costs - 70520</td>
</tr>
<tr>
<td>05. Other</td>
<td>Data &amp; Membership Dues - 76730</td>
</tr>
<tr>
<td></td>
<td>Events/Fundraising or Public Affairs - 70960</td>
</tr>
<tr>
<td></td>
<td>Film, Photography, Other (incl Video) - 71000</td>
</tr>
<tr>
<td></td>
<td>Film and Photography - 70680</td>
</tr>
<tr>
<td></td>
<td>Fire Alarm Testing and Service - 73020</td>
</tr>
<tr>
<td></td>
<td>Fire Extinguisher Testing &amp; Service - 73020</td>
</tr>
<tr>
<td></td>
<td>Flowers and Gift Items - 70870</td>
</tr>
<tr>
<td></td>
<td>Furniture Under $5000 - 70560</td>
</tr>
<tr>
<td></td>
<td>Miscellaneous - 72330</td>
</tr>
<tr>
<td></td>
<td>Periodicals, Subscription &amp; Books - 71720</td>
</tr>
<tr>
<td>06. Entertainment &amp; Alcohol</td>
<td>Entertainment Expenses (10 + attendees) - 70868</td>
</tr>
<tr>
<td></td>
<td>Entertainment Expenses (3-9 attendees) - 70869</td>
</tr>
<tr>
<td></td>
<td>Entertainment Incl Alcohol - 70865</td>
</tr>
<tr>
<td></td>
<td>Entertainment Student Recruiting (10 + attendees) - 70861</td>
</tr>
<tr>
<td></td>
<td>Entertainment Student Recruiting (3-9 attendees) - 70869</td>
</tr>
<tr>
<td></td>
<td>Flowers for Rose Dev/Alumni Events - 70871</td>
</tr>
<tr>
<td></td>
<td>Gifts for Rose Dev/Alumni Events - 70872</td>
</tr>
<tr>
<td></td>
<td>Office Refreshments - 71650</td>
</tr>
<tr>
<td></td>
<td>Tickets to External Events - 70510</td>
</tr>
<tr>
<td>10. Meals</td>
<td>Business Meals - Meals (10+ attendees) - 70310</td>
</tr>
<tr>
<td></td>
<td>Business Meals - Meals (2-9 attendees) - 70310</td>
</tr>
<tr>
<td></td>
<td>Group Dinners Per Dine - 72340</td>
</tr>
<tr>
<td></td>
<td>Per Dine $26.60 - 72350</td>
</tr>
<tr>
<td></td>
<td>Per Dine $26.60 - 72354</td>
</tr>
<tr>
<td></td>
<td>Per Dine $50.00 - 72354</td>
</tr>
<tr>
<td></td>
<td>Per Dine $80.60 - 72364</td>
</tr>
<tr>
<td></td>
<td>Travel Individual Meal - 72343</td>
</tr>
<tr>
<td>11. Travel</td>
<td>Airfare - 72341</td>
</tr>
<tr>
<td></td>
<td>Hotel - Per Dine - 72344</td>
</tr>
<tr>
<td></td>
<td>Hotel Accommodations - 72344</td>
</tr>
<tr>
<td></td>
<td>Hotel Events - 72344</td>
</tr>
<tr>
<td></td>
<td>Laundry - 72350</td>
</tr>
<tr>
<td></td>
<td>Travel - Faculty/Staff Residences - 72330</td>
</tr>
<tr>
<td></td>
<td>Travel - Hotel Phone &amp; Internet - 72392</td>
</tr>
</tbody>
</table>
TRAVEL FACTS

- Travel must be approved prior to any purchases of airfare, conference registrations, etc.
- Expenses must be “reasonable”.
- The best way to avoid “unreasonable” expenses is to ask first.
- Your faculty advisor may not know the policies.
- Your CHBE staff will know the policy or will find out.
- All travel must be submitted through Concur.
RICE TRAVEL POLICY

- University Policy #806.

- Rice University pays for appropriate and reasonable expenses for travel, business meetings and entertainment that are necessary to carry out university business and that are in compliance with applicable Internal Revenue Service (IRS) and sponsored research requirements and other external rules and regulations. Payments that comply with legal and policy requirements are not considered taxable income.

- Link to Policy #806: https://policy.rice.edu/806
IRS rules require business expenses to be documented in a timely manner. Undocumented, improperly documented or untimely submission of business expenses will require Rice to report these expenses as taxable income to the individual. Thus, travel, business meeting and entertainment expenses should be submitted and approved no later than thirty (30) calendar days after the return from a business trip or end of the meeting or event.

As a 501(c3) organization, the university is exempt from the payment of Texas sales and use taxes. The university may also be exempt from sales and use taxes in other states. The university strongly encourages employees and students to request the sales tax exemption. The university reserves the authority not to reimburse for sales tax for transactions that would be qualified for sales tax exemption.
RICE TRAVEL POLICY

- Where travel and business meeting costs are charged to a sponsored agreement (grant or contract), any terms of the agreement that are more restrictive than this policy will govern the payment.

- The university's *business travel accident insurance policy* covers faculty, staff and students traveling on behalf of the university. This policy provides an accidental death benefit for all employees and students while on university business. This policy covers domestic as well as foreign business travel. The university does not reimburse a traveler for purchasing additional flight insurance.

- The university’s *auto insurance policy* covers faculty, staff and students traveling on behalf of the university. When traveling within the U.S. and Canada, auto insurance must be declined by faculty, staff and students when renting cars while conducting university business. For foreign travel outside the U.S. and Canada, damage and liability insurance should be purchased.
DEPARTMENT TRAVEL POLICY

- A travel authorization form MUST BE COMPLETED AND APPROVED prior to making any travel related purchases

Who are you?

When/where/why are you going?

How much do you think you will spend?

Who is paying?
DEPARTMENT TRAVEL POLICY

- Complete form
- Obtain Advisor approval
- Obtain Department approval
- Make any pre-travel purchases. Working with Maria is optimal. Using her card is preferable to using your advisor’s card.

  Conference/Registration Fees
  Abstract Submission Fees
  Airfare Expense
  Lodging deposits when required
  Poster Printing
• Airfare may be purchase through Concur, or directly through a travel website.

• Purchase may be made on a p-card or personal card.

• Do **not** purchase travelers insurance. The University’s business travel accident insurance policy covers employees and students when traveling on behalf of the university.

• Rice policy requires travelers to fly coach. No upgrades may be charged to Rice but are allowable at your own expense. Some exceptions are made for medical or extended flights.

• For personal travel associated with your business travel there are special requirements. You **MUST** discuss these plans with administration **BEFORE** purchasing your airline ticket.

• If traveling internationally you must use U.S. carriers when travel is funded by federal funds. Again, be certain to discuss with administration **BEFORE** purchasing your airline ticket.
Option 1:
- Print a copy of your travel authorization form
- Attach receipts for all charges made on a p-card, and a copy of the conference agenda.
- Give to p-card account holder

Option 2:
- Create a pdf and send it all via email.
POST TRAVEL INCLUDED IN EXPENSE REPORT:

GROUND TRANSPORTATION (SHUTTLE SERVICE/TAXI/CAR RENTAL)

AIRPORT PARKING & MILEAGE

LODGING

MEALS

OTHER
Ground Transportation & Car Rental

In Houston – use Super Shuttle or drive/park. Your online reservation for shuttle transportation is an acceptable receipt. Concur will calculate your mileage reimbursement once you enter start/end points. Allow plenty of time if parking at the airport to use inexpensive remote parking lots.

At destination – use shuttles when possible, if using taxi or Uber be certain to ask for a receipt.
CAR RENTALS

The university’s auto insurance policy covers employees and students traveling on behalf of the university except foreign travel outside the U.S. and Canada; damage and liability insurance should be purchased. You must decline auto insurance offered by a car rental company unless you choose to pay for it yourself.

GPS is not a covered expense under most circumstances.

Fuel charges should be avoided by refilling the gas tank at a nearby facility prior to returning the vehicle.
LET’S TALK LODGING

Room-sharing is encouraged by most advisors when feasible.

If one person pays for a shared room, it MUST be noted in comments (include name).

For **Texas and selected states** hotel accommodations you must request exemption for Texas Hotel State Occupancy Tax.

Receipts for hotel accommodations must be itemized in the Concur report. Itemizations include the daily room rate and taxes paid.

Do not include personal expenses for wifi, mini-bar, safe, movies, room service, etc.
LET'S TALK LODGING

STATES IN WHICH TO OBTAIN SALES TAX EXEMPTION:

Connecticut
Florida
Indiana
Kansas
Kentucky
Michigan
New Jersey
Ohio
Tennessee
Texas
Utah
Wisconsin
Wyoming
MEALS

- Meals for one-day travel may not be claimed per Rice policy.
- When dining in Texas for Rice/Department be prepared to provide the vendor/restaurant with the tax exemption form (available on the controller’s website).
- Some local establishments may be aware of the Rice policy and not need the form. Meal rates are always decided by the advisor and indicated on the Travel Auth. (however, this rate can not exceed the government per diem).
- First and last day of travel will generally be adjusted per the travel times.
- Alcoholic beverages are NOT an allowable expenditure.
- Receipts MUST be itemized when not claiming per diem.
MILEAGE REIMBURSEMENT

- Allowable to/from home airport. Enter start and end points in your Concur report and it will calculate.

- Allowable for some trips depending on distance and in other special circumstances. Remember, using your personal vehicle creates some liability.

- May be limited to the amount of airfare to the same destination. Discuss with administration prior to using this option.
Attach to your final report all receipts for purchases over $25. Best Practices Policy for the department requires all receipts be included in the Concur Expense Reports. If you lost the receipt you must attach a missing receipt affidavit, which may or may not be allowed based on the expense type.

For travel expenses you must always submit receipts for lodging, airfare and car rental, no matter what the total amount paid. The $25 exclusion does not apply.

REMEMBER the 30 day rule!
Other Business

Communications
follow us on twitter
like us on facebook
add us on linked in

Send news items to Andrea
aa113@rice.edu