



Concur Travel and Entertainment Training Schedule

Classroom Style Training

(see other training options below)

Dates: 1/29 (Tu); 2/21 (Th)

Location: VCC North

This schedule is subject to change; therefore please check the Finance Web site the day before you will be attending.

Segments	Time	Content
Segment 1	9:00-9:25	General System Overview: Traveler Profile* Travel Assistants* Expense Delegates* Mobile Registrations for Smart Phones/Devices*
Segment 2	9:30-9:55	Booking Employee Travel: Utilizing the on-line Concur Tool* Preferred Vendors and Travel Policies* Payment of Travel/Virtual Accounts*
Segment 3	10:00-11:00	Expense Reporting: Payment of Expenses/Virtual Accounts* Gathering Receipts/Storing Electronically* Completing an Expense Report* Expense Categories/Types* Features:* Exchange Rates Mileage Calculator Hotel Itemization Attendees FOAPAL Allocations attaching Receipts Personal Expense on Company Card Workflow/Approvals Expense Delegate Preparing an Expense Report
Segment 4	11:00-11:30	The Role of an Approver: Business/Financial Managers Manager/Supervisor
Segment 5	11:30-12:30	Guest/Visitor/Rensselaer Student Travel
Segment 6	1:30-2:00	Business Manager Training: Transactions posted in Banner Account Codes by Expense Type
Segment 7	2:00-3:00	Hands-on Assistance

*Training available online



Other Options:

Listen To Recorded Training

Most sessions have been recorded and are available on the Finance Web site at:
FINANCE.RPI.EDU > Business Administrators & Employees > Training & Presentations > Online Concur
Training Sessions

This is a great option in that you can jump in and out of the training at your convenience and not have to sit in a classroom at a specific time.

Portfolio/Department Trainings

We are willing to conduct group trainings/Q&A sessions for portfolios and/or departments. The date/time and location is of your choosing. Just let us know and we'll be there.

Hands-on Training/Assistance

We are also willing to provide one-on-one hands-on training/assistance. Each half-hour to one-hour session will take place in the Rice Building by appointment only.

Please contact Christopher Thorne (thornc3@rpi.edu; x2395) to schedule any of these additional trainings.