



UCONN | UNIVERSITY OF
CONNECTICUT

Concur Travel and Expense
School of Fine Arts Retreat
August 2019

Concur Travel and Expense

Agenda

1. Procurement Reorganization
2. What is Concur?
3. Concur Request
4. Concur Travel
5. Concur Expense
6. Travel Card Program
7. Project Timeline
8. Questions and Comments

Procurement Solutions Center – What is it?

The Procurement Solutions Center was established to deliver superior customer service and value to the University community through a single point of entry.

Under the leadership of Nancy Patrylak, Procurement Solutions Center Manager, the services provided by PSC include the following:

- ❖ Travel Services: Intake/bookings
 - ❖ University Procurement & Travel Card Programs (PCARD/TCARD)
 - ❖ Vendor Management
 - ❖ HuskyBuy, Concur (travel In-take) & KFS (Procurement functions) System Administration
-
- Single point of customer service entry through HuskyBuy line 860-486-2BUY
 - Functions in a customer service team - based approach
 - Partners with campus customers to understand and support current and future needs and provide more robust and professional experience.

Concur Travel and Expense

What is Concur?

UCONN will be deploying SAP Concur, a cloud-based Travel & Expense management software application. Concur allows for business travelers to capture their entire trip in one single application from the travel pre-approval, travel booking, and expense reimbursement.

UCONN will be deploying the following modules:

- **Request:** module used to seek pre-approval for travel.
- **Travel:** Concur's online booking tool.
- **Expense:** module used to record business expenses – includes out-of-pocket expenses as well as University Card products (Travel Cards and Pro-Cards)



Expense Report



Verify



Reimburse

Concur Travel and Expense

Concur Request

The Request module will be used by UCONN travelers to seek Travel pre-approval. Formal pre-approvals will provide an avenue for employees to request travel in an easy to use system and allow the fiscal officers the ability to approve the budget for the trip.

Trip Type	Employee
In-State (Without Segments*) ¹	Not Required ²
In-State (With Segments*)	Required
Out-of-State (Without Segments*) ¹	Not Required ²
Out of State (With Segments*) ¹	Required
International	Required

* Segments include airfare, hotel, car rental, and/or rail (excludes commuter rail)

¹ Trip Type cannot be selected if Request includes any Segments (Air, Hotel, Car Rental, Rail)

² System will allow them to submit a Request for Duty of Care Purposes

Concur Travel and Expense

Concur Request

In addition to Pre-Approval, the Request module in Concur can be used to obtain the following:

- **Guest Travel Bookings:** University employees will be able to request pre-approval for guest travel via Concur. Once approved, the employee will call Key Travel to book on behalf of the guest.
- **Bradley Parking Pass:** automated notification to Travel team upon approved Travel Request
- **Cash Advances:** rules and amount limitations will be configured into Concur to ensure amounts requested are in line with UCONN's travel policy

The screenshot displays the Concur Request module interface. At the top, the Concur logo is visible, along with navigation tabs for Requests, Travel, Expense, and App Center. The user's profile is shown as 'Proble' with a help icon. The main content area is titled 'Request 33NU' and includes a 'Manage Requests' section with 'New Request' and 'Quick Search' options. The request details are as follows:

- Request Name:** Trip from Dallas to San Francisco
- Purpose:** Meeting with Partners
- Status:** Not Submitted
- To be approved before:** 07/23/2014 03:05 pm
- Amount:** \$1,685.53

Below the request details, there are tabs for 'Request Header', 'Segments', 'Expense', 'Approval Flow', 'Audit Trail', and 'Travel Advisory'. The 'Segments' tab is active, showing a list of segments with icons for different travel types. The first segment is a 'Hotel Reservation (Self-booked segment)' with an amount of \$527.00. The details for this segment are:

Check-in	City	Hotel
	San Francisco, California	Travel Inn Advisory - Modesto (Jury)
	Date:	Monday, November 10, 2014 01:00 pm
	State:	San Francisco
Check-Out		Date:
		Thursday, November 13, 2014 02:00 pm

The second segment is an 'Air Ticket (Self-booked segment)' with an amount of \$342.25. The details for this segment are:

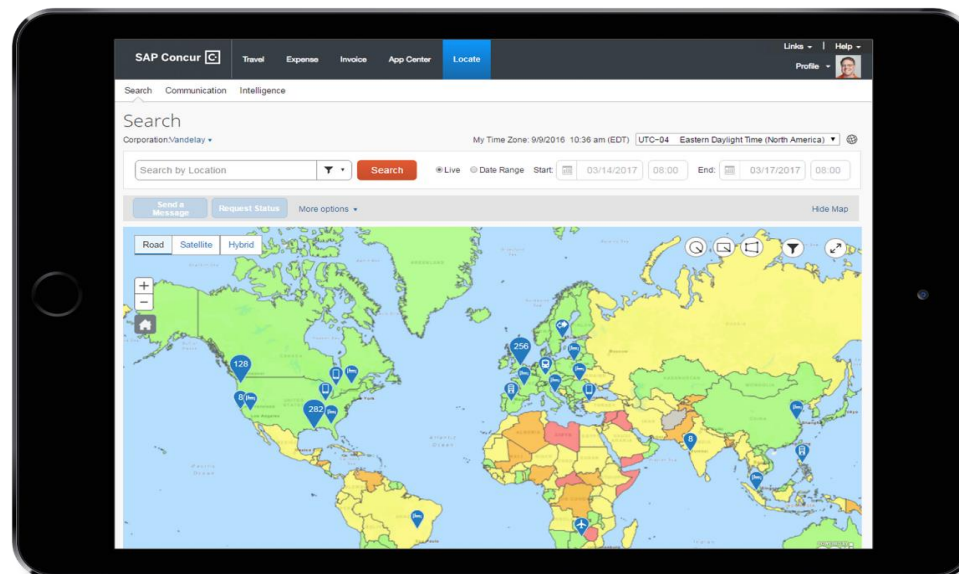
From	Flight
Dallas Ft Worth Intl Airport - (DFW), Dallas, Texas	044214
To	Class
San Francisco Intl (Airport) - (SFO), San Francisco, California	E
Depart Time	Duration
Monday, November 10, 2014 02:42 am	04:05

Concur Travel and Expense

Concur Request – Duty of Care

The final important piece of the request module is functionality related to Duty of Care.

- Duty of Care enables UConn to know where employees and students will be traveling to, and in the case of an emergency, communicate with travelers to ensure their safety and/or provide safety instructions
- The location of the traveler can be determined in a variety of ways:
 - Based on the dates/times/locations entered on the pre-approval request.
 - Based on the uploaded itinerary from a traveler who booked outside the system
 - Based on the employee initiating a “ping” in Concur to alert the system to their current location.



Concur Travel and Expense

Concur Travel

The Concur solution provides employees a commercial look and feel to book pre-approved travel directly online. This process is backed by the travel management company, Key Travel. Concur, with the help of Key Travel, will provide:

- A broad inventory of global booking options for airfare, hotels, car rentals, and rail travel
- Reports and real-time information to guide informed travel decisions
- Travel planning that ensures employees are compliant with University policy
- Mobile applications which provides a streamlined travel experience
- 24/7 customer service utilizing Key Travel employees for complex travel bookings as well as emergencies while travelling.



Concur Travel and Expense

Concur Expense

Concur's Expense module will be used for entry and approval of all expense reports. With the use of "Audit Rules" travelers and approvers will be notified of potential issues when completing and reviewing expense reports.

Key Highlights of Concur Expense include:

- Daily interface with University Card provider, importing all expenses into Concur for processing and enhanced transparency.
- T&E Policy enforcement – Concur can identify when receipts are required, when limits have been exceeded, etc.
- Electronic Receipt Capture – Simply take a picture of a receipt and upload it to the expense report.
- Automated Workflow – Expense reports are routed based on employee profile and specific report criteria.



Concur Travel and Expense

Travel Card Program

As part of the Concur implementation, UConn will be administering a new Travel Card program.

Key Highlights of the T-Card Program include:

- The travel card program will be company bill company pay and linked to the traveler's profile.
- Travel Cards will be issued to University faculty and staff when approved by their supervisor and a dean, director, or department head.
- A direct feed from JPMC to Concur will allow travelers to see their Travel Card transactions on a daily basis and easily apply them to expense reports. One expense report will be submitted per trip.
- Pro-Cards will remain in place and will also be integrated into Concur with a module called Company Billed Statements. Some faculty and staff may be responsible for two separate cards: one for purchasing and one for travel.

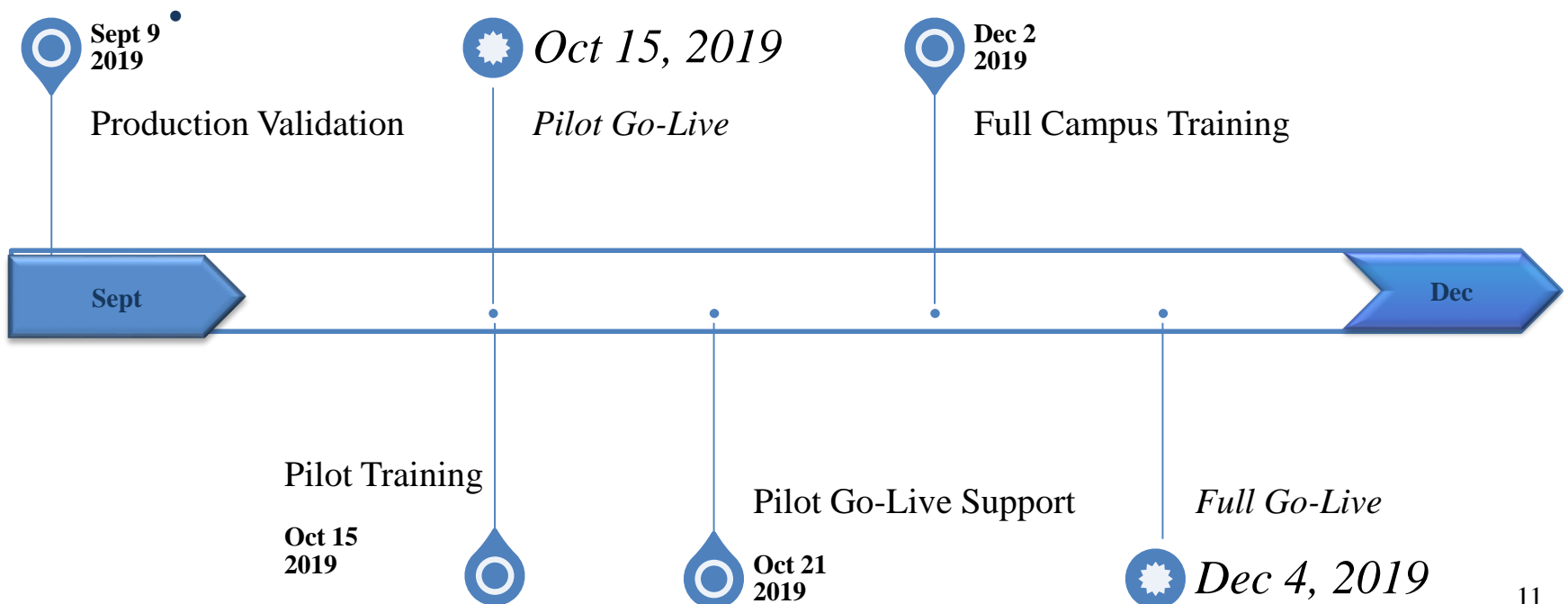


Concur Travel and Expense

Project Pilot and Milestone Timeline

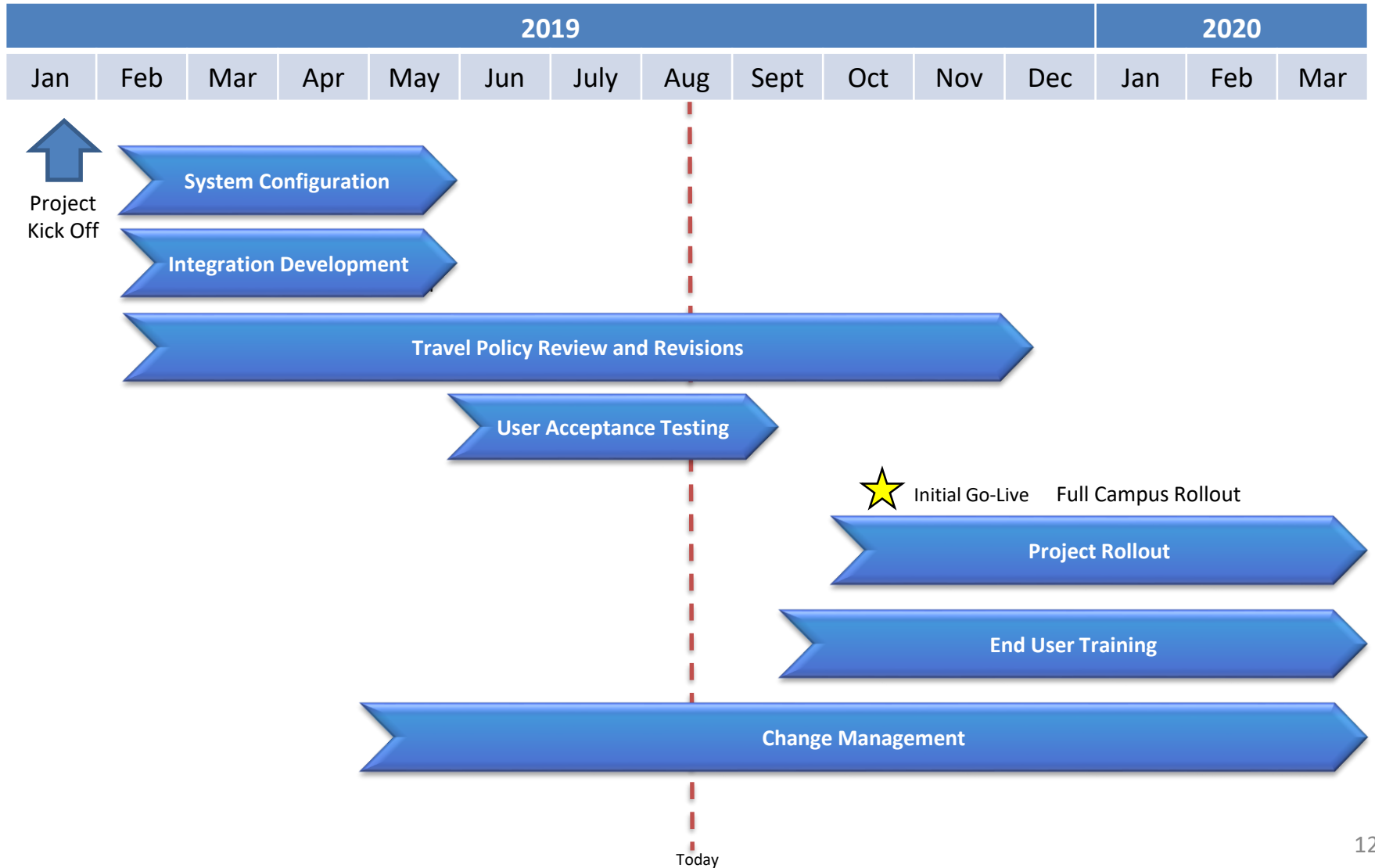
To make this project successful, it is necessary to conduct a pilot of the software before rolling it out to the entire University community. We appreciate the willingness of the following departments to be involved in this program.

- Admissions
- School of Business
- CLAS (EEB, STAT, COMM)
- Athletics
- ITS



Concur Travel and Expense

Project Timeline



Thank you for your time and attention!

Questions?



Contact Us Through Our Project Mailbox:
Travel.Project@uconn.edu

Visit Our Website:
<https://concurproject.uconn.edu>