Concur Travel and Expense
Associate Dean and Department Head
Meeting
September 2019

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

Take A Look Around Concur

https://www.youtube.com/watch?v=DzU5yp8pI_E

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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 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.
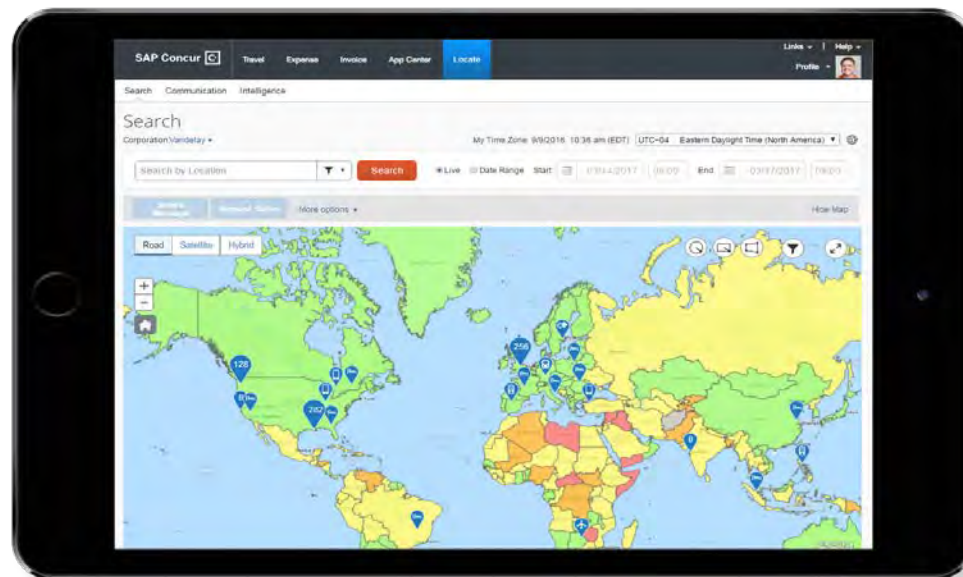
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Concur Travel

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.

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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.
- 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.

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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.
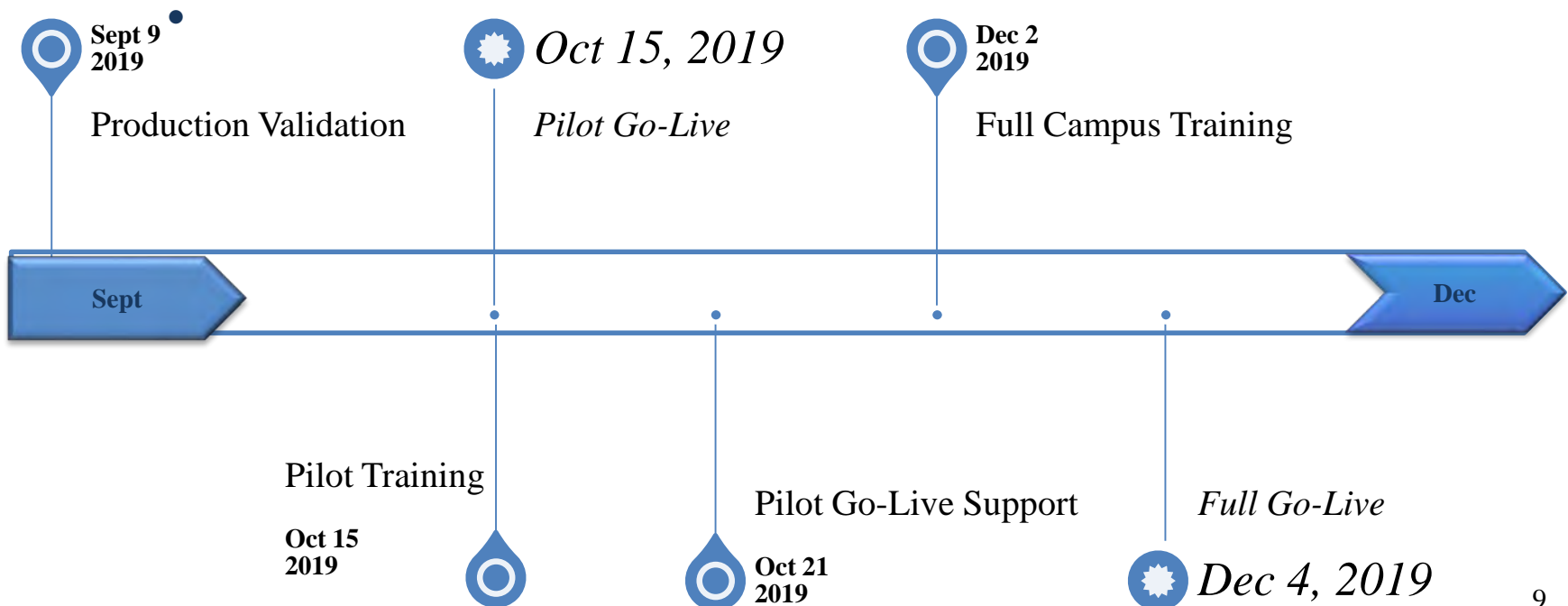
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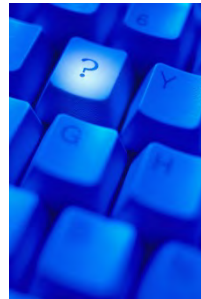
Project Pilot and Milestone Timeline

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 and STAT)

- Athletics
- ITS

Sept 9 2019
Oct 15, 2019
Dec 2 2019

Production Validation
Pilot Go-Live
Full Campus Training

Sept
Dec

Pilot Training

Oct 15 2019

Pilot Go-Live Support

Oct 21 2019

Full Go-Live

Dec 4, 2019

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Thank you for your time and attention!

Questions?

Contact Us Through Our Project Mailbox:
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Visit Our Website:
https://concurproject.uconn.edu