Concur Travel and Expense
Associate Dean and Department Head
Meeting

December, 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 a 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

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Additional Rollouts: Travel Card, Updated Travel Policy

As part of the Concur implementation, UConn will be administering a new Travel Card program and rolling out Travel Policy Changes

Key Highlights of the T-Card Program include:

- 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.
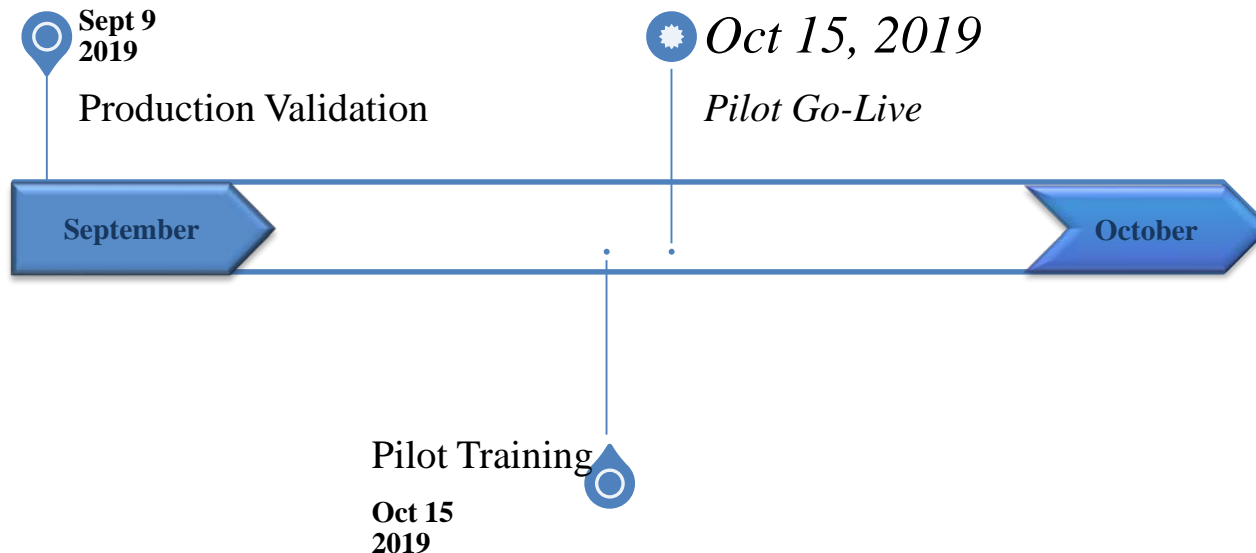
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Project Pilot

To make this project successful, it was 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 involved in this program.

- Admissions
- School of Business
- CLAS (EEB and STAT)

- Athletics
- ITS

Sept 9 2019

Production Validation

Oct 15, 2019

Pilot Go-Live

September

October

Pilot Training

Oct 15 2019

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Pilot Lessons Learned

Summary of lessons learned from the Pilot:

1. Training
   a) Format & Frequency of training to be re-tooled.
      a) Training registration online
      b) Additional Town Hall sessions created for Q&A.
2. Communications
   a) More direct communication to employees and customized to role.
   b) Additional communication is required on the policy and procedure changes.
   c) Communication needs to be provided via various mediums.
3. Travel Card applications need to be available to employees ahead of go-live.
   a) Currently, 280 Travel cards have been processed. We anticipate more as we roll out the system.
4. Key Travel
   a) Learning curve
      a) Project team has daily meetings with Key travel to familiarize them with UConn's Policies and Procedures

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Training and Communication

Training:

- Re-tooling current training format to accommodate needs of diverse campus constituents.

  - Administrative Support

  - Approver Training

  - End User Training

- Training to include: In person sessions, short videos and online documentation, open labs
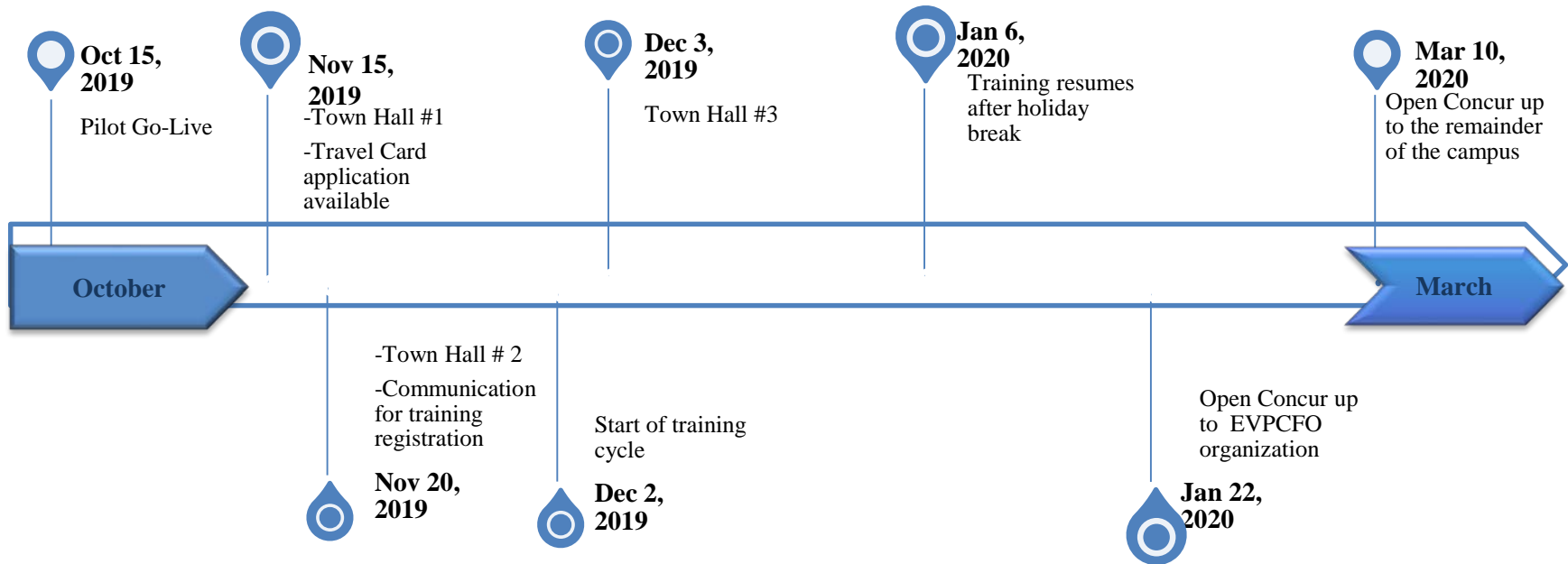
Communication Mediums:

- Town Hall Meetings:

- Direct Departmental Communications

- List Servs

- Daily Digest, UCONN at Work

- Regional Campus Road Shows
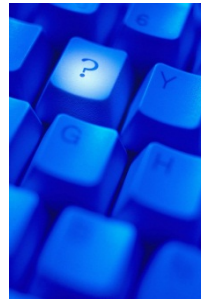
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High Level Timeline

Oct 15, 2019
Pilot Go-Live

Nov 15, 2019
-Town Hall #1
-Travel Card application available

Dec 3, 2019
Town Hall #3

Jan 6, 2020
Training resumes after holiday break

Mar 10, 2020
Open Concur up to the remainder of the campus

October ➡️ March

-Town Hall # 2
-Communication for training registration
Nov 20, 2019

Start of training cycle
Dec 2, 2019

Open Concur up to EVPCFO organization
Jan 22, 2020

Upcoming Incremental Milestones

- Student and Guest Travel
- Company Billed Statements (CBS)
- Reimbursement for relocation costs
- Processing fellowship payments

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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

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Take A Look Around Concur

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