Concur Travel and Expense
Delegate Training
January 2020
Agenda

1. Overview – Request, Travel, Expense
2. Request and Expense Approval Workflow
3. Travel Card Program
4. Mobile Options
5. Delegate Options
6. Demo
7. Questions and Comments
What is Concur?

SAP Concur, a cloud-based Travel & Expense management software application available to UConn. Concur allows for business travelers to capture their entire trip in one single application, including 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)
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.

<table>
<thead>
<tr>
<th>Trip Type</th>
<th>Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-State (Without Segments*)¹</td>
<td>Not Required ²</td>
</tr>
<tr>
<td>In-State (With Segments*)</td>
<td>Required</td>
</tr>
<tr>
<td>Out-of-State (Without Segments*)¹</td>
<td>Not Required ²</td>
</tr>
<tr>
<td>Out of State (With Segments*)¹</td>
<td>Required</td>
</tr>
<tr>
<td>International</td>
<td>Required</td>
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</tbody>
</table>

* Segments include airfare, hotel, and car rental.
¹ Trip Type cannot be selected if Request includes any Segments (Air, Hotel, Car Rental)
² System will allow them to submit a Request for Duty of Care Purposes
The Request module in Concur can be used to obtain the following:

- **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
- **COMING SOON! - 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.
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.
Travel Request Workflow

Submit Request for Approval*

Routed to Traveler’s Direct Supervisor**

Routed to Fiscal Officer(s) on Account(s) identified in Request

* Requests to travel to a banned state, embargo country, and Level 3 or 4 countries/regions will be routed for additional approval (e.g., export control, global affairs)

** Primary supervisor as it appears in CORE-CT
Concur provides UConn travelers an online solution to book pre-approved travel. Travel booked in Concur 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
• Travel planning that ensures employees are compliant with University policy
• 24/7 customer service utilizing Key Travel employees for complex travel bookings as well as emergencies while travelling.
Concur Expense

Concur’s Expense module will be used for entry and approval of all expense reports (travel and non-travel 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:

• **Importing all expenses** into Concur for processing
  ✓ Daily interface with University Card provider
  ✓ Enhanced transparency

• **T&E Policy enforcement** built into Concur to help 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.
Submit Expense Report for Approval*

Routed to Traveler’s Supervisor**

Routed to Fiscal Officer(s) of account(s) charged

* Expense reports related to Athletics recruiting or charged to grant accounts (SPS) will be routed for additional approval (e.g., athletics compliance officer, account PI, SPS control group, etc.)

** Primary supervisor as it appears in CORE-CT
As part of the Concur implementation, UConn will be administering a new Travel Card program.

**Key Highlights of the Travel 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 into 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.
TripIt Pro and Concur Mobile App

Concur Mobile
- Login using PIN (setup in Profile)
- View Travel Details and Alerts
- Snap picture of expense receipts (feeds directly into traveler queue in Concur)

TripIt Pro
- Organizes all travel plans in ONE master itinerary
- Sync with mobile device calendar, as desired
- Link your email to automatically import travel plans from your inbox
Delegates

In Concur, a delegate is someone who is authorized to perform various tasks within the system on behalf of another Concur user.

There are several types of delegates:

• A Preparer Delegate
• An Approval Delegate
• A Previewer Delegate

NOTE: Separate from a delegate, a traveler must assign travel arranger(s), if desired.
Contact Us with Any Questions:

Travel@uconn.edu, or

Call 6-2289