School of Fine Arts
Concur Travel overview

April 2021

Introduction

- **Daniel Warren –** Director of Accounts Payable and Employee Reimbursements

- **Jonathan Galligan –** Manager, Accounts Payable – Employee Reimbursements

- **Nancy Patrylak –** Procurement Solutions Center Manager

- **Shannon Haley** – Anthony Travel – UConn's dedicated travel agent

- **Allison Hestick -** Travel Specialist (Procurement)

Concur Travel and Expense

Agenda

1. Overview – Request, Travel, Expense
2. Request and Expense Approval Workflow
3. University Card Programs
4. Delegate Options
5. Mobile Options
6. Upcoming Training Sessions
7. Additional Resources
8. Questions?

What is Concur?

SAP Concur, is a cloud-based Travel & Expense management software application available to UConn. Concur allows UConn employees and students to request, book and expense travel as well as reimburse for non-travel out-of-pocket business expenses. Coming soon – UConn employees will be able to book travel for guests

The following modules are included:

- **Request:** Module used to seek pre-approval for travel.

- **Travel:** Concur's online booking tool for Airfare, Hotel and Car Rental.

- **Expense:** Module used to record/reconcile travel and non-travel out-of-pocket business expenses.

Expense Report → Verify → Reimburse

Concur Request

The Request module will be used by UConn travelers to seek Travel* pre-approval. Formal Concur 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**. **Faculty and staff should refer to the SFA's internal travel policy.**

Trip Detail/Segment	Request
Airfare	Required
Hotel	Required
Car Rental	Required
Personal Car Mileage	Not Required
Business Meal	Not Required
Conference Registration Fee	Not Required

- * Travel is defined as any trip with airfare, hotel, and car rental. Regardless of trip details, approval should be obtained from the traveler's supervisor prior to booking travel.
- **For AAUP and UCPEA awards the department account will be used on request. The AAUP and UCPEA award account will be used, if applicable, on the Expense report along with the Travel Award number.

Travel Request Approval 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 Travel

Concur provides UConn travelers an online solution to book travel. Travel booked in Concur is backed by our Travel Management Company, Anthony Travel. Shannon Haley is UConn's dedicated travel agent with Anthony Travel and will be able to assist you with reservations, cancellations and/or changes. Shannon can be reached at 860-325-2558 or UConnCampusTravel@anthonytravel.com

Concur, with the help of Anthony Travel, will provide:

- A broad inventory of global booking options for airfare, hotels, and car rentals.
- Travel planning that ensures employees are **compliant with University policy.**
- Personalized service through a dedicated agent. This includes help with cancelled flights, rebooking flights, resolving issues, etc.

Concur Expense

Concur's Expense module is used for entry and approval of all travel expense reports

With the use of "Audit Rules" travelers and approvers will be notified of potential issues when completing and reviewing expense reports.
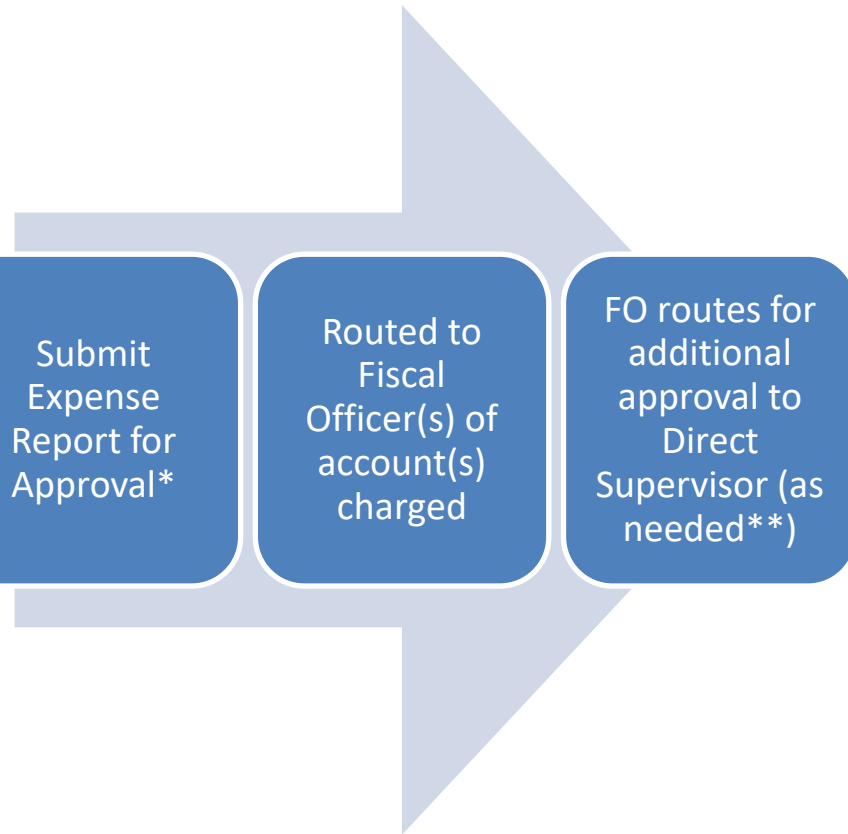
Key Highlights of Concur Expense include:

- **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.
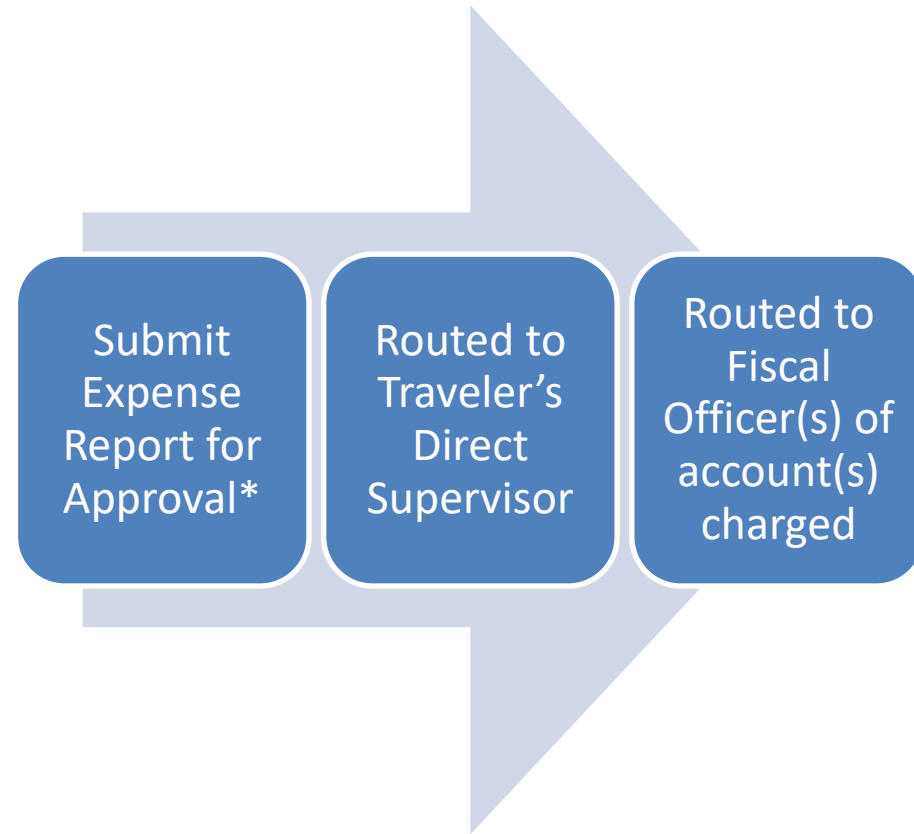
Expense Report Approval Workflow

With a linked Request

| Submit Expense Report for Approval* | Routed to Fiscal Officer(s) of account(s) charged | FO routes for additional approval to Direct Supervisor (as needed**) |

Without a linked Request

| Submit Expense Report for Approval* | Routed to Traveler's Direct Supervisor | Routed to Fiscal Officer(s) of account(s) charged |

* Expense reports charged to grant accounts (SPS) will be routed for additional approval (e.g., account PI, SPS control group, etc.)

** FO should approve and forward to traveler's supervisor if approved request significantly differs from details in submitted expense report.

University Travel Card Program

Travel Card

- Will be issued to University **employees** when approved by their supervisor and a dean, director, or department head.
- Typically takes 10 business days to receive the Travel Card once fully approved. It is recommended that a travel card application be completed as soon as possible
- Can be used to pay for UConn business expenses while traveling.
- Can be used for only these types of non-travel activities
    - Local business meals (i.e. you do not need to be traveling)
    - **Virtual Conference** registration fees which are allowed to be charged to the Travel Card even though no travel is taking place. The Travel Card is recommended to be used for registration fees rather than the Pro-Card.
- UConn employees who do not travel but sponsor guests should apply for the Travel Card. Ability to pay for guest's airfare and hotels with direct relationships (ex. The Graduate)

Delegates

Type of Delegate	Description of Role
Preparer Delegate - authorized to assist with the preparation of Requests and Expense Reports in Concur.**	• The cardholder, will be responsible for submitting the report after the Preparer delegate has prepared it.
Approver Delegate - authorized to provide approvals on behalf of another Approver in Concur.	• Only existing Approvers (Direct Supervisor in Core-CT or Primary FO in KFS) can be assigned as an Approver Delegate.
Previewer Delegate – authorized to review approvals on behalf of an Approver in Concur	• Previewer delegates can do most of the leg work of reviewing the transactions, receipts and other supporting documents but will not be able to approve the report. • After the Previewer delegate has completed their review, they can notify the Approver by clicking Notify Approver to the top right of the report within Concur.

*Instructions on **How to add a Delegate** can be found on our Training and Resources Page. Once a user assigns a Delegate, that person will have access to all modules of Concur including Company Billed Statements.*
Due to SFA's internal controls, FSO staff members cannot be delegates.

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Concur Mobile

- [Login using SSO](#) (setup in Profile)
- Snap picture of transaction receipts
- Create and approve reports (feeds directly into user's queue in Concur)
- OCR capabilities - Concur will populate fields from receipt and assigns picture of receipt. Note preparer delegates do not have this functionality and could forward receipt to Concur or manually enter

Airline credits

Airline credits

- We are currently working with major airlines to convert unused tickets to a UConn central account
    - Departments will be credited for the value of the ticket
    - Future ticket purchases will utilize the UConn central account where the Department will be charged as if they purchased the ticket.
    - Further guidance will be provided

Live Concur Refresher training sessions available!

To register for one or more of each session navigate to [Training and Resources page](#) and click the appropriate registration links at the bottom of the page. Note – training is also recorded and accessible anytime

Concur Request and Travel Booking Refresher (1hr 30 mins)	• This session is recommended for users creating Travel Requests or booking traveling on behalf of UConn.
Concur Expense Refresher (1 hr 30 mins)	• This session is recommended for users seeking reimbursement for UConn travel related business expenses.
Personal Car Mileage and Non-Travel Expense reports (1hr)	• This session is recommended for employees seeking reimbursement for UConn Business related expenses including out of pocket reimbursements in Concur.
Concur Approver Refresher (1 hr)	• This session is recommended for employees approving Travel Requests and/or Travel and Non-travel Expense Reports.
Company Billed Statements (CBS) APPROVER Information Session and Demo (1hr)	• This session is recommended for approvers (FO's, PI's and other special approvers) of Company Billed Statement (Pro-Card) Reports.
Company Billed Statements (CBS) Information Session and Demo (1hr)	• This session is recommended for UConn Pro-Card holders and their Preparer delegates.

For additional guidance please review the following links
prior to contacting the Travel Department with questions at travel@uconn.edu

- UConn Concur login – Single Sign On link (SSO)

- UConn Concur Training & Resources page

- Changes to the UConn Travel and Expense policy

- UConn Travel Card Programs

- Concur FAQs (Request, Travel, Expense)

Questions?