Concur Travel and Expense

Agenda

1. Website Launch
2. Frequently Asked Questions (FAQs)
3. What’s Changing for the University?
4. Concur Demonstration
Concur Travel and Expense

Website Overview

https://concurproject.uconn.edu/
Concur Travel and Expense

Frequently Asked Questions (FAQ)

1 When is preapproval required?
The University is requiring preapproval for any travel that includes segments (airfare, hotel, or car rental) regardless of cost.

<table>
<thead>
<tr>
<th>Trip Type</th>
<th>Request Required</th>
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<tbody>
<tr>
<td>In-State (Without Segments*)</td>
<td>Not Required</td>
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<tr>
<td>In-State (With Segments*)</td>
<td>Required</td>
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<tr>
<td>Out-of-State (Without Segments*)</td>
<td>Not Required</td>
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<tr>
<td>Out of State (With Segments*)</td>
<td>Required</td>
</tr>
<tr>
<td>International</td>
<td>Required</td>
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</tbody>
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* Segments include airfare, hotel, and/or car rental
1 Trip Type cannot be selected if Request includes any Segments (Air, Hotel, and/or Car Rental)
2 System will allow them to submit a Request for Duty of Care Purposes

2 What happens if you do not request preapproval prior to your trip?
Expense reports that contain segments (airfare, hotel, or car rental) without a linked approved request cannot be submitted. Travelers will need to submit a request post-trip. To discourage requests being submitted post-trip, they will route for additional higher-level approvals.
3. **Are travelers required to book their travel via the Concur online booking tool or through Key Travel?**

It is strongly recommended that travelers book within the system to ensure compliance with University Travel Policies and to take advantage of negotiated rates with preferred vendors. Additional benefits to the traveler are available on the Concur Project Website (https://concurproject.uconn.edu/home/)

4. **If a traveler is receiving partial funding for a trip, how should segments be booked?**

The traveler has two options to handle this scenario:

1. The traveler can pay for all expenses out of pocket (e.g. using a personal credit card, cash, etc) and submit for their partial reimbursement once all travel is completed.
2. The traveler can call Key Travel directly and request that the payment for each segment be split between the University’s lodge card and their personal credit card.
Frequently Asked Questions (FAQ)

5. **What happens if a traveler’s expense report exceeds the amount on the request?**
The requested amount is an estimate. Actual expenses will be reviewed and approved by the direct supervisor and the Fiscal Officer of the account(s) being charged.

6. **When do travel expenses post to KFS?**
Expenses are posted to KFS/the general ledger (GL) once the expense report is fully approved in Concur.

7. **What is the lead time for acquiring a T-Card? How long does it take from application to receipt of card?**
Once the application is approved, it takes 7 – 10 business days for the T-Card to be received by the University.
Frequently Asked Questions (FAQ)

8 How will guest travel be booked?
Departments are required to obtain preapproval for guest travel via Concur Request. Once the request is approved, travel must be booked directly with Key Travel. Departments may allow guests to call Key Travel with the approved request ID or the department can call to book on their behalf.

9 Will expense reports need to be submitted in Concur for non-employees (guests)?
No. Expense reimbursement for non-employees will remain the same process as it is today through HuskyBuy.

10 Who will be granted the approver role within Concur?
Direct Supervisors (as defined in CoreCT), Fiscal Officers (FOs), Sponsored Programs, Global Affairs, and Export Control
What’s Changing For The University?

1. Requesting Travel
   a) Pre Approval

2. Booking Travel
   a) Travel Management Company
   b) Concur Online Booking Tool
   c) KFS Account Numbers at the Time of Booking
   d) Direct Bill for Hotels and Car Rentals

3. Expensing Travel
   a) Travel Web-Form
   b) Allocation of Expenses
   c) Policy Enforcement
Concur Travel and Expense

What’s Changing For The University?

4. Automated Workflows
   4. Required Request Approvals
   5. Require Approvals to Book Travel
   6. Required Approvals for Expense Reports
   7. Required Approvals for T-Card Application

5. Duty of Care
   a) What is Duty of Care?
   b) How does Duty of Care work?
   c) When will Duty of Care be available to travelers?
Concur Travel and Expense

Project Timeline

<table>
<thead>
<tr>
<th>2019</th>
<th>2019</th>
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<tbody>
<tr>
<td>Jan</td>
<td>Feb</td>
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- **Project Kick Off**
- **System Configuration**
- **Integration Development**
- **Travel Policy Review and Revisions**
- **User Acceptance Testing**
  - Initial Go-Live
  - Project Rollout
  - End User Training
- **Change Management**
  - Full Campus Rollout

Today
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