Concur Service Advisory Board Meeting  ** January 16, 2020

Attending: Brian Strait, Lindsey Salfran (Risk Services in lieu of Flo Hoskinson, Krista Dillon), Leeann Ford, Josh Buetow, Teri Rowe, Angie Peatow, Mark McCulloch, Keith Zvoch, Jim Klenke, Mike DeMartini, Katy Molloy Brady, Adam Unger, John Beeson, Brooke Millett Montgomery, Stacy Williams Wright, Laurie Jacoby.

Absent: Jon Marchetta, Jody Bleisch, Brady Nittman, Brian Conley, Della Green, Kayleen Cautrell, Lisa Mick Shimizu, Naomi Crow. Marcia Walker has retired and will be removed from the committee list.

Cost Object Approval:

A consulting service will be required for us to move forward with Cost Object Approval as the UO will need to develop a program and administration around the data required to provide for this option in Concur. We would probably only implement it for certain work groups. The question was asked to the group as to whether it is worth the investment as we have been working almost two years using the exiting “approval by traveler”. It was also pointed out that a deterrent to Cost Object is that if a report contains multiple indexes it will require multiple approvals and will take longer to get the report processed. Brian discussed a hybrid approach we have developed in which a group of indices directs to a special workflow, currently being utilized by Katy Malloy Brady’s GEO group.

Adam Unger in Research was an early proponent because of faculty who travel on grant funds for research but are from other “home” departments. Adam indicated that assigning travelers to Concur user groups has been working for his team. Stacy sited another means they have implemented in which the home department paid for the travel expenses and the institutes reimbursed the home department.

Reporting:

The Concur admin team is continuing to work toward quarterly reports for unsubmitted expense reports and unassigned credit card transactions. It was requested that Brian provide a tutorial on how to run this report for a specific Concur user group. (UNSUBMITTED EXPENSE ENTRY REPORT). Once the quarterly report has been fined tuned and is ready to send, we will “burst” it to the BI manager/traveler’s approver. That person can forward to a delegate, supervisor or anyone else who can assist in getting reports submitted.

Both Travel and P-Card reports will be in the report. Katy requested a column for header index be added to the report.

There are still many departments who have not established themselves into Concur user groups. The reports and fiscal cleanup will be more efficient if we can get all user groups set up and can identify the group’s BI manager and main travel contact person.

Other Concur reports: Departments can send report needs to Laurie or Brian and Cognos reports can be created to automatically deliver. Or we can built a query in concur and the BI manager can prepare the report on demand.
Basic Economy Fares:

Laurie reported on the launch (November 2019) and evolution of Basic Economy fares and asked for feedback. Adam Unger’s group is happy to have the option and is now able to purchase within the UO managed travel program.

The fares now feature a “pause” that requires the traveler to acknowledge that they understand rules on the non-changeable/non-refundable fare. Teri Rowe noted that BE fares do not allow 24 hour prior check in or use of mobile boarding pass. The fares provide no advance seat assignment and as these tickets are last to board the plane, there is often no overhead space for your bag. The main drawback is that absolutely no changes are allowed.

Concur security:

Personal travel: A few travelers have reported concern that their personal travel occasionally appears in Concur. These are informational only segments (itinerary) and can either be deleted or hidden. Personal use of uoregon email in airline profiles or reservations confirmations will cause the information to appear in Concur due to the vendor integration. The UO does not report, look at or care about this information, traveler’s Concur profile is locked down with duck id. Some traveler’s find it helpful to use the Trip Library as a resource for all travel plans, but the bigger issue/question is using UO email address for personal business. All UO emails are subject to public records request so should not be used for personal business.

Student employee with confidentiality indicator: All UO employees with payroll records have Concur profiles, including student employees. Due to FERPA security concerns, all 95 numbers have been removed from Concur searches. Students who have opted for privacy protections profiles have been removed in Concur. These student’s travel will have to be processed as Guest travel on a host profile and they are not able to provide Concur support for anyone since they do not have their own profile.

High risk country messaging: This notification provides information about taking computer equipment into a country that is deemed high risk for which the UO loaner program is recommended. It was recommended that the messaging may be confusing for travelers, does not provide good direction for a traveler to get answers to questions. There was an issue with messaging and Locate which has been solved. A second message related to embargoed countries flows to Risk and Safety approval and has been identified as not firing upon Concur Request. Concur team has filed a Concur support ticket.

Travel Updates from recent conferences:

CHELF: Concur Higher Ed Learning Forum was attended by Brian. He reported that the future waive will be airlines selling tickets in “bundled package” proving difficult to compare prices for the average consumer. This has started in Europe and has proven to upset the industry marketplace. This will probably happen gradually – taking away meals, charging for bags, the introduction of Basic Economy fares are all indicators that the trend is coming. We should expect to see disruption in business travel and for our TMC partners.

Notre Dame uses Concur to send infrequent traveler emails to provide “Next Steps” and checklists. Targeted messaging can be tailored to assist in report building or other tasks. The advisory board is interested in learning more. Brian will search out report copies.
**SCTEM:** Brooke attended the Society for Collegiate Travel and Education Management conference and was proud to report that the UO made some good decisions when implementing and customizing the UO’s Concur system, implementing a managed travel program, working with our TMCs, contracting with the airlines for discounts and conducting 100% report review.

**New Business:**

**Request and Booking Tool:** UO has the ability to make an adjustment to allow a reservation/booking that is different from the parameters indicated in Request. Currently, when a traveler books something different than what was approved, a new Request will spin up, requiring approval for the change. Some departments want this visibility, some do not care. The Advisory Board seemed to think that flexibility would be desired and preferred by their travelers.

**February 12 for UO Vendor and Travel Fair**

Mark mentioned that the UO could go out for competitive bid with an RFP for our TMC contract which might allow us to embrace an on-campus presence, or only a single TMC, simplifying the managed travel program and Concur. The board reported loyalty of their travelers to both their agent and their TMC and did not see a need to do this until the current contract expires.

**Josh Buetow wish list:**

- Ability to change header fields in Request by approvers.
- Ability by approver/budget authority to change index and activity code in PCard statement

**Considerations by committee:**

- P-Card - Is there a desire to have a default approver versus the current “select the approver you want to send to”. Approvers must be set up with statement approver permissions.

Some custodians have multiple cards that have to go to different approvers, we would need a hybrid where there are some users that have an assigned default approver and then some that can select a different approver for each card they manage.

**Thanks goes out to Brooke for her program management assistance and note taking prowess. We also thank Brian Strait and Jody Bleisch for their knowledge, diligence and patience in Concur program support.**

Mark McCulloch

Laurie Jacoby