

Concur Service Advisory Board Meeting ** October 14, 2019

Attending: Teri Rowe, Kayleen Cautrell, Katy Molloy Brady, Keith Zvoch, Angie Peatow, Josh Buetow, Mike DeMartini, Naomi Crow, Jim Klenke, Brooke Millett-Montgomery, Brian Strait, Laurie Jacoby, and Jon Marchetta

Absent: Adam Unger, Brady Nittman, Brian Conley, Della Green, Jody Bleisch, Krista Dillon, Leeann Ford, Lisa Mick Shimizu, Marcia Walker, Mark McCullough, Stacy Williams-Wright

Delegates submitting on behalf of users and 95# issues in Concur

Process was approved and rolled out to campus late summer. Question: Who can submit on behalf of the traveler? Anyone with a 95#? A student employee?

Because of FERPA security concerns, 95#s have been removed from Concur. It is possible that students may end up being removed from Concur if there is continued concern. This would result in all student travel needing to be processed as Guest travel. Because they would not have profiles, they would not be able to act as delegates for departmental travelers so they would not be able to submit for travelers.

Naomi reported that she wants to cut over to the new Opt Out workflow as a unit and that it will take some time to get the agreements coordinated and completed.

Computers to Loan for International Travel

Information Services is launching a device loan program to facilitate technology and intellectual property for faculty/staff/students who travel to certain international destinations for UO business. Concur has been activated to provide email messaging to users upon entry of their trip request. This is an initiative to facilitate import/export controls, protection of intellectual property, and deter technology sabotage prevalent in some locations.

Department of Energy has a list of countries where technology resources need to be secure (laptops, tablets, etc. . .). IS has a number of devices that they can loan. For program details please email Infosec@uoregon.edu . The auto emails from Concur will be sent out to Traveler, supervisor, and infosec@uoregon.edu,

Upon return the traveler's information/documentation is given to them and the device is scrubbed.

There will be fine tuning of the email cadence from Concur as the program develops.

The list of locations changes regularly so is not planned to be posted on the Travel Office website, though Travel Office will look into providing a link to the DOE or to IS for list of countries.

Questions: Will there be an FAQ for travelers? How much lead time? Types of Devices?

IS will need at least a couple of days to prepare a machine. The machines are more fortified, meaning the level of access for users will remain the same as though they were using their usual machine.

Both MAC and PC available, some tablets, and perhaps phones.

International Travel Insurance

History: Prior to Concur travelers were registering their international travel and when they registered would provide an index in order for Risk Management to charge the department for the insurance.

Safety and Risk have been working to have this now happen in Concur to streamline the process. The insurance premium applies (through Concur) to all international travel taking place after October 1, 2019. Cost of the insurance is \$2.50 a day. International affairs pays up front a lump sum for their usage.

There are several scenarios that have presented questions for which details will be made available soon: Sabbatical travel, a possible premium cap, extended travel, personal time, etc.

Insurance is for medical coverage, emergency evacuation, repatriation of remains, etc. and any number of claims have been filed, one for up to \$1.2 million.

The insurance coverage is not new. Travelers have been registering international travel with Safety and Risk and the departmental index has been paying for insurance. Using Concur as a method for this transaction was vetted and approved with VPFA's office.

The insurance will cover up to 14 days of personal travel. Travelers can pay for additional personal days over 14 days. Safety and Risk does want faculty members to register their family members and pay personally for the insurance for the family, if the family is staying at a property the UO is paying for.

Concur is calculating the amount based on dates supplied in the request header and there is a hard stop if the expense is not added to the report. The bridge program between Concur and Banner is being developed to accommodate this transaction.

Comments: Historically, it felt like the insurance was optional. It was not clear that the insurance was in place whether or not a department registered for the trip and paid the per diem premium. Could be an issue for some travelers who did not know this was coming, especially for sabbatical travel when the bill could be 675.00 or more.

Airline Contracted Discounts

New: Delta 4-13% beginning early November. The discounted fares will be coded into Concur.

Working to develop monthly discount reports that can be made available to the CSAB group.

Discounts are calculated on the published fare.

UO also has agreements currently in place with Alaska and United. These must be booked with the TMC (travel agency) or in the concur booking tool

Travel Office released approximately 22 Sky Miles Point tickets to campus. There will be more offered quarterly until all of the tickets have been issued. With new Delta discount no new points will be accumulated. There is a small fee that will have to be paid to the airline to use the free tickets. This fee is okay on the One Card, personal credit card, or even P-Card as an exception.

Delta Sky Miles: no status recognition, but tickets allow for seat assignments and changes. There is a fee to check a bag as with a regular economy ticket.

Basic Economy Airfare Available in Concur and Through TMC

Initially, Basic Economy fares were not available via Concur as typically they are not a good buy where business travel is concerned, but campus demand, the fares are being made available.

Basic economy fares offer no frequent flyer miles, no free bags, no seat assignment, no carry on with some airlines, and **no exchanges**.

In early November, Concur users will be able to see basic economy fares in Concur and through the travel agency.

Questions: Will there be a cost comparison requirement in order to educate campus on the limitations of basic economy and weight out the cost benefit. A: There is no plan to require a comparison. Travel Office is hoping for either a pop warning, check box acknowledgement, or some other element that will serve to alert travelers of what they are purchasing.

Brief discussion on allowing business class fares, if administration is considering basic economy, can we consider business class fares for domestic travel. This would be a policy decision at a higher level.

Managed Travel Program Brainstorm

Compliance on management travel program is about 80% compliance campus wide in the first year. How does UO get the remaining 20% on board?

Ideas:

- No reimbursement if airfare purchased out of compliance
- Charge a percentage fee on purchases outside the system. This would be a tool to show what the UO is losing when airfare is purchased outside of the system (discounted fares and rebate)
- Educate campus on the benefits of using the travel agents. Messaging to campus on time management and benefits of using TMC, key is creating relationships with an agent. Reminding travelers that they are “on their own” if they purchase outside the system and a change event occurs (weather or mechanical cancellation, change in business itinerary, etc. .)
- Giving a closer look at why some individuals on why the 20% are booking out of compliance, have a conversation with these travelers, rather than guessing at why they are out of compliance. Find out why and help brainstorm ways to make the system work for them.
- Relationship with agent is really important (meet and greet with the agents? Travel Fair?)
- Departmental direction and advice to guide travelers, for example some departments require use of the travel agency. These departments don’t want the travelers or admin assistants to assume the role of being the travel agent. Let the experts handle it.
- The cost argument of agency fee needs to be negated by the benefits and remind people that it has always been 28.00/25.00 dollar prior to Concur.
- After hours emergency help.

Other Good of the Order

New Technician in the Travel Office-Sally Frisella new. Tina Fenley has retired.

Processor program-14 department processors in campus departments. They are completing payment of travel reimbursements and bypassing Travel Office (Travel Office audits reports processed directly in the department). Any interested departments, please let Laurie know.

Campus travelers are having some challenges moving around in the booking tool. Ideas to consider:

Hover over a field or piece of information in Concur and policy or Concur system information would pop up. Generally, faculty will not go looking for policy on the Travel Office website, but if it can easily come up in Concur, this would be a helpful feature. How do we get more information into Concur regarding policy for new travelers?

Can there be a pop-up that can be turned off and on-so when a traveler feels more comfortable they no longer will see the helper messages (like a word “wizard”).

There are too many pop-ups and messages that don’t apply to a traveler, so the traveler ignores. Essentially too much information is training people not to pay attention to audit rules.

The audit flags tell the problem, but now how to correct.

Conference message never goes away, users want messages to go away once they are fixed. Can we have a click off to make the error message/audit message go away once resolved?

Box of exceptions is small, though in new UI this will be bigger.

If you click on the line in the exception box (upper portion of screen in Concur expense report), it will take you to the expense line in the report so that you know which line item needs to be corrected.

Travel Office to review the audit rules to determine if they are all still relevant as campus becomes more used to Concur and more familiar with policy.

In Request, can the question, "Will you be gone any term other than summer?" be reworded? For example: , "Will you be gone any time between September 15 through June 15?" Note that dates for Law School are different than from the rest of campus so something to consider when reviewing the verbiage.

One Card for student group travel, is this an option? This is in development, if departments have specific needs, make Travel Office aware so they can further analyze use cases.