To: All University Travelers

From: Kelly B. Wolf, Associate Vice President for Business Affairs and Controller

Date: June 21, 2018

Re: Concur System

Introduction:

I am writing to all university travelers to explain the background, status, and next steps relating to the Concur travel system and to address several concerns raised regarding the system. As explained below, I am confident that we are taking steps to quickly get through this implementation phase and to move into a steady-state where travelers, travel coordinators, and approvers feel confident that the Concur system is meeting their travel needs. These actions are explained in detail below and include:

1. A clarification that, after an initial delay, we are now providing reimbursements within pre-Concur timelines;
2. A clarification that the implementation of the Concur system does not change who needs to perform certain types of tasks associated with booking and reimbursements;
3. A clarification that travelers can still book basic economy fares through our contracted travel agencies;
4. A listing of our trainings and a commitment to provide department trainings upon request; and
5. A commitment to assist departments with the approval process in order to reduce the time period between a traveler seeing a ticket and the purchase being approved.

Discussion:

In March, 2018, Business Affairs deployed the Concur travel and expense management system to replace the university's homegrown DuckWeb travel reimbursement process. The DuckWeb travel system will soon be inoperable (due to the BANNER 9 transition) and we were faced with the option of either completely rewriting the homegrown DuckWeb system or implementing an externally-produced and maintained system to manage campus travel. After consultation and collaboration with a campus-wide team, we made the choice to implement Concur.

Concur is a suite of products that integrates all aspects of employee travel, including the booking of airline flights and hotels, automatic upload and transfer of receipts, direct integration of per-diem tables, and preparation of travel expense reimbursement requests. Unlike our prior system, Concur includes mobile solutions for those who wish to use them,

and a direct communication link to a risk management product so that travelers and the university can be informed in case we have travelers in harm's way.

One of the strengths of the Concur system is flexibility in configuration and user-interaction. The Concur project team reviewed the ways that university travelers performed tasks prior to the system conversion and found that there was no consistent model on campus. Certain travelers rely heavily on department administrative personnel; other travelers have been self-servicing their travel needs for years. Concur is configured to support these options and all other variations in between. Even though the computer system changed, there has been no requirement or mandate for travelers (or their departments) to alter their methods/levels of traveler support. Those faculty and staff who previously had administrative support for travel can still rely on administrative support provided by their department/school/college/institute to prepare their travel reimbursements. The only steps which must be done by the travelers themselves, consistent with past practice, are the review and submission of the Concur Request and the final Concur Expense Report.

We have heard from some of you that you like the new system and the extra features it provides. We have also heard just the opposite from others of you. Complaints heard include: the system is not intuitive; there is too much time investment needed to do simple things; the flights individuals want either aren't listed, are too expensive, or change price before the ticket is purchased; there was inadequate system training; there aren't any training materials/guides; and/or reimbursements are simply taking too long.

I hear your concerns. We are taking steps (some immediate, some longer-term) to address these issues and identify a path forward. I believe that Concur will live up to its reputation as a best-in-class travel solution once we get past the pain points typical with an implementation of this size and scope.

Here, arranged thematically, are the steps that we are currently taking to relieve some of the issues that have been brought up:

Timeliness of Reimbursements

- As of this writing, the queue of pending travel reimbursement requests is eight (8) working days. BAO Travel has worked quickly through the backlog that built immediately following the Concur transition, and we are back to within the range of 7-10 working days that was typical prior to Concur implementation.
- Prior to the Concur implementation, certain university departments had certified travel coordinators who could directly approve and invoice travel reimbursements. These certifications were suspended at the time of implementation in order to verify that these coordinators were comfortable and confident with the new system. BAO Travel is committed to the certification program and process, and will, effective

immediately, greatly accelerate their reviews/verifications in order to restore certification status to those travel coordinators as soon as possible. BAO Travel also encourages travel coordinators who wish to be certified for direct approval and invoicing to contact the Travel Office.
- There is additional time-sensitivity related to expenses posted to federal grant funds (since these funds are on a reimbursement basis). BAO Travel will prioritize pending travel reimbursement requests that are posted to grant funds in order to allow for timely billing of the project sponsors.

Flight Options

- The Concur Booking Tool doesn't currently show Basic Economy fares, but you can still purchase these types of tickets through a contracted travel agency. Basic Economy fares are typically cheaper on their face, but come with numerous restrictions: extra fee to select a seat, extra fee for both checked bags and carry-ons, flight is not eligible to earn frequent-flier miles, etc. The most potentially-costly downside is that Basic Economy tickets are non-refundable, non-changeable, and non-transferable (so if a flight change is required, the traveler/university must purchase a new ticket and "eat" the cost of the first one). However, all that being said, if you feel a Basic Economy ticket best meets your needs, it can still be purchased through one of the contracted travel agencies.
- Airline tickets can change prices (both up and down) between the time you originally see it through the Booking Tool and the time the Concur Request is approved and the flight is ticketed. Unfortunately, as was the case under our previous system, this is somewhat out of our control. Airlines are constantly changing their ticket prices (sometimes hourly). However, we are committed to working with departments to help train approvers so that we can decrease the time between holding a ticket and the purchase being approved.
- A Concur Request can be processed and approved well in advance of travel. Then, when an inexpensive flight becomes available, it can be booked immediately through the Concur Booking Tool against the already-approved Request. No secondary approval is needed.

System Training and Documentation

- The BAO Travel Group runs several drop-in sessions every week for Concur users. These sessions are open to travelers, travel coordinators, delegates, or approvers. No registration is required. The schedule of dates/times is available here: https://ba.uoregon.edu/content/travel
- BAO Travel can, upon request, come out to departments and conduct more-detailed group training.

- There is a Concur Procedure Manual [here](). We will update this manual with screen shots and additional checklists to make it more user-friendly.
- We are interested in feedback about the training and materials. We know your time is valuable and want to provide materials (videos, guides, checklists, etc.) that you find the most useful.

Communication to Travelers

- We have already taken steps to reduce the number of Concur emails/notifications that are being sent to travelers, delegates, and approvers.
- We maintain a Concur FAQ [document]() and update it regularly.
- Campus travel coordinators have a dedicated listserv where we have been sending Concur tips and tricks (among other topics). Campus travelers can opt-in to receive these emails by submitting an email address [here]().
- We do not want to flood email inboxes, but we do want to put relevant information directly into travelers' hands on a timely basis. As such, will create a separate mailing list dedicated to travelers (anyone who traveled on university business in the past year) and will send periodic updates to that list.

I appreciate the feedback (both positive and negative) that has already been brought to my attention re: the Concur implementation (and always welcome more). Only by knowing where the rough spots are can we take steps to alleviate them. Conversely, knowing where travelers are seeing benefits allows us to share best practices so that other travelers and the overall university can benefit.

I do sincerely apologize for any disruptions that this system conversion caused. It is certainly never our intent to make it harder for people to do their jobs, but that is occasionally an unexpected consequence during the implementation phase for projects like this. I ask for your continued patience as we make system and procedure changes to improve both Concur and the overall travel management program.