Concur Implementation Update
July 10, 2014

Booking travel through Concur/CTP is <u>recommended</u>, but not required. See list of reasons to book through Concur/CTP. An approved Travel Request is required before booking any travel.

Employee travelers can <u>delegate</u> someone else to complete their Travel Request and/or Expense Report but must log in to <u>submit</u> their Travel Requests and Expense Reports into workflow.

When employee travelers first log into Concur, they will make the following updates:

- Delegate one or more trip arrangers (if desired), such as Department Travel Card custodians, who can book travel on their behalf in Concur or with CTP
- Opt-in to receive e-receipts
- Enter date of birth (TSA requirement)
- Indicate gender
- Verify email address
- Enter frequent flyer accounts (if desired)
- Enter travel preferences (if desired)
- Download mobile app (if desired)
- Enter your personal credit card (if desired – the first 12 digits will be masked)

Pilot (2 -3 weeks in early August) followed by campus-wide implementation.

User Setup <u>Before</u> Implementation – AP will Load from Excel Spreadsheet Updated by CDAs

- Travelers (Employees) and their Supervisor
    - Employees who traveled in the past two years and their "reports to" supervisor
        - CDAs will update supervisor, if needed
        - CDAs indicate default cost center (optional) – cost center can be changed or added on the Travel Request and/or Expense Report
- Travel Request Creators / Travel Expense Report Creators / Trip Arrangers
    - Voucher creators
    - Travel Card cardholders, custodians, and business contacts
    - Travelers
- Certifying Signatories / Unit Heads / Tax Dept / VPs / President (Authorized Approvers)
    - Employees can only be in one authorized approver category
    - CDAs will determine Unit Heads (can approve non-employee travel)

User Setup <u>After</u> Implementation – Update Users in Concur by Sending Form to AP Travel

- Terminated employees will be inactivated automatically through nightly feed to Concur
- Add new users (i.e., travelers, supervisors, authorized approvers, delegates, and travel arrangers)
- Change supervisor
- Add/change default cost center
- Add/change delegate to create Travel Request / Expense Report
- AP will add/remove Travel Card cardholders automatically