

This week marks the one year anniversary for the implementation of Concur on the OU Norman campus! The year has been both exciting and challenging! A change of this magnitude is always challenging. Prior to the implementation of Concur, no significant changes in the travel and expense reimbursement processes had occurred in 25+ years.

A quick look back...

- February 2015 - FCM was added as an approved travel agency with online booking capabilities.
- February 2016 – Concur Request and Expense was implemented to complement and enhance online opportunities associated with requesting approval for travel, booking travel, and filing expense reports for reimbursement of travel expenses.
- February 2016 – OU travel cards were made available to Concur users to provide travelers a means to pay for allowable travel expenses to minimize the use of travelers' personal funds for university business travel.
- Summer 2016 – Several changes were made in response to feedback from travelers. The most significant changes included allowing delegates to submit requests on behalf of a traveler, removing the default department, and adding new expense types of "Event Information" and "Attachments Required/Requested by Department."
- Spring 2016 to now – Quick Guides have been developed and posted at <http://www.ou.edu/controller/fss/concurtravelnews.htm> that address the most common questions/pain points presented to concur@ou.edu and Financial Services.

The Concur implementation team and staff of Financial Services continues to evaluate the system and find opportunities to improve upon Concur and the related processes. This evaluation will continue so that the system can be improved to better serve university travelers. In that vein, here are some recent changes/efforts that we want to make you aware of:

Website

<http://www.ou.edu/controller/fss/concurtravelnews.htm> has been in existence for a while now. It has recently been updated to include additional resources and a number of new quick guides for travelers. Please check it out!

Training

Training sessions for travel (including information about Concur) are now scheduled. There is a link to HR's Workshop Calendar at <http://www.ou.edu/controller/fss/concurtravelnews.htm> to sign up for a session.

New Changes

Delegate submit permissions

Delegates now have the "Submit" button available to them when acting on behalf of another traveler. This allows delegates to see **all** system generated exceptions that exist for the report before advising the traveler the report is ready for them to submit. In order to make the "Submit" button available to delegates, we had to inactivate the "Notify" button for delegates. An audit rule is in place to prevent

delegates from actually submitting expense reports for active employees due to the state requirement for the traveler certification.

Travelers will need to go to their profile settings, check the “Can Submit Reports” permission for their delegates and Save for this functionality to be available.

Please see the quick guide *Delegate submit for expense reports* for additional information about this change. Remember, quick guides are available at <http://www.ou.edu/controller/fss/concurtravelnews.htm>.

Duty Station

The State of Oklahoma recently changed the required information for duty stations. An actual address, instead of city and state, is now required. A default address was added to Concur for the convenience of travelers. If you are **not** a Norman campus employee, you **must** change the address in the Official Duty Station Address field. If you are a Norman campus employee, you **may** change the address. Please see the quick guide *What is my official duty station address* for additional information.

Single Sign On

We are currently working with Concur and IT to provide Single Sign On for Concur. This means you will soon sign on to Concur with your OU 4+4 and network password. When you change your network password, your Concur password will change as well.

Reminders

Mobile applications

There are three mobile applications available to use with Concur. They are Concur Mobile, Expenselt, and Triplt. All three apps are good, but Expenselt is especially nice for taking pictures of receipts any time, any place.

Verify your email address

By verifying your email address in your profile, you are enabling Concur to tie your email address to your Concur account. This allows you to email receipts to receipts@concur.com and they will be placed in your Concur account for use with an expense report.

Travel policies

General travel policies for the university are available at <http://www.ou.edu/controller/fss/policies/travel.pdf>. The implementation of Concur did not change the travel policies. This is primarily due to the requirement that the university follow the State Travel Reimbursement Act of the State of Oklahoma.

Many comments and concerns have been expressed recently about the need for Comparable Air Fare quotes. Please see page 4 of the general travel policies for information on this topic. You may also view the quick guide covering this requirement at <http://www.ou.edu/controller/fss/concurtravelnews.htm>.

We hope you find the above information helpful. If you have questions or need additional information, please email concur@ou.edu (or visit the Concur website!).



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