

Concur Travel and Expense Pilot Overview

Presentation to
Research Administrators Network

February, 2010

Concur Project Update

Concur pre-pilot went live 8/15/2009

Concur pilot went live 10/15/2009:

- Participants in 14 organizations across campus
- In excess of 4000 employees
- Over 400 P-Card reconciled
- 4180 expense reports created for \$3,111,084.45
- 1711 reimbursements made for \$687,138.41
- 239 airline reservations made for a total of \$107,301.17
- 52 hotel reservations made for a total of \$16,457.18
- 31 car rental reservations made for a total of \$4993.31

Pilot Employees Supported with

Change Management activities:

- Unit Readiness presentations
- Interchange presentations
- Lab sessions (poorly attended)
- Brown Bag session (Dental School)
- Comprehensive training materials:
 - Employee/Delegate and Approver eLearning courses
 - Guided simulations
 - Step-by-step procedures

Employee Feedback

Surveyed pilot participants for feedback upon:

- Expense report
- Travel
- Training

Reviewed all feedback for possible:

- Configuration changes
- Training updates
- Possible enhancement requests for Concur

Employee Feedback Expense Reports

System off-loads duties previously handled by administrative staff onto faculty and staff.

Appreciate that system places less reliance on administrative personnel.

Felt that multiple warning flags were confusing.

Impressed that warning flags identified duplicate expenses and felt highlighting of policies were helping employees positively change behavior.

Employee Feedback Expense Reports

Concerned that attaching and viewing receipts was a cumbersome process.

Appreciated ability to scan receipts and attach them electronically. Found fax solution to be consistently positive.

Preferred previous paper-based approval process.

Appreciates that electronic process allows for prompt reimbursement of faculty and staff expenses.

Employee Feedback Travel

Concerned that Concur pricing is not always competitive with other industry pricing.

*Thought booking was excellent – on par with Orbitz.
No reason to book outside Concur.*

Frustrated with \$7 booking fees.

Employee Feedback Training

Indicated some users purposefully not taking training or calling Help Desk in lieu of taking training.

*Felt training materials were comprehensive
and easy to understand*

Requested “minimum” training package for faculty with delegates

*Appreciated Change Management activities –
Unit Readiness, Interchanges, and Brown Bag Session*

What Comes Next

Plan to roll-out Concur to remaining U-M employees:

- Phased roll-out planned
- Reviewing several date options at this time
(Consulting with key populations as to ideal/less than ideal dates)
- Reviewing support structure for staffing
(ITS Help Desk and Procurement Services Tier 2)

Questions?