

HOW TO SUCCESSFULLY IMPLEMENT CONCUR IN YOUR DEPARTMENT

Presenters:

Meg Mitchell, Travel Services

Erika Bagnoli, Graduate School of Education

Katie Burd, Division of Athletics

Meghan Phipps, School of Social Work

CAMPUS IMPLEMENTATION

- November 2017 – March 2018
 - Hosted 2-3 training sessions per week
- Currently host monthly training and lab sessions



REASONS TO CONTINUE TRAINING AND IMPLEMENTING CONCUR

- New employees and travelers
- Infrequent travelers
- Provide refresher and updates





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**ERIKA BAGNOLI, UNIT BUSINESS
OFFICER**

**GRADUATE SCHOOL OF
EDUCATION**

SUCCESSFUL CONCUR IMPLEMENTATION

Who? What? When? Why? How?

- Who? – everyone
- What? – Town Hall and function focused training meetings
- When? – identify timeline
- How? – review system functionality and what existing process it will replace
- Why? – provide explanation of the change, its importance and benefits





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**KATIE BURD,
DIVISION 1 ATHLETIC
UNIVERSITY RELATIONS
DIRECTOR**

ATHLETICS DEPARTMENT

CONCUR IMPLEMENTATION PLAN

Pre-implementation:

- Identified key liaisons for implementation – “super-users”
- Organized 1-hour group training meetings (5-6) to expose staff to the system and discuss forthcoming changes
- Communicated resources available on UB *EDGE* and the Administrative Services Gateway



CONCUR IMPLEMENTATION PLAN

Implementation:

- Business office staff provided support for creating reports and re-educating employees on travel rules
- With approval from the employee, business office staff were given delegate responsibility to provide better support over the phone
- Business office staff called UB Concur support if they did not know and would pass information along to employees



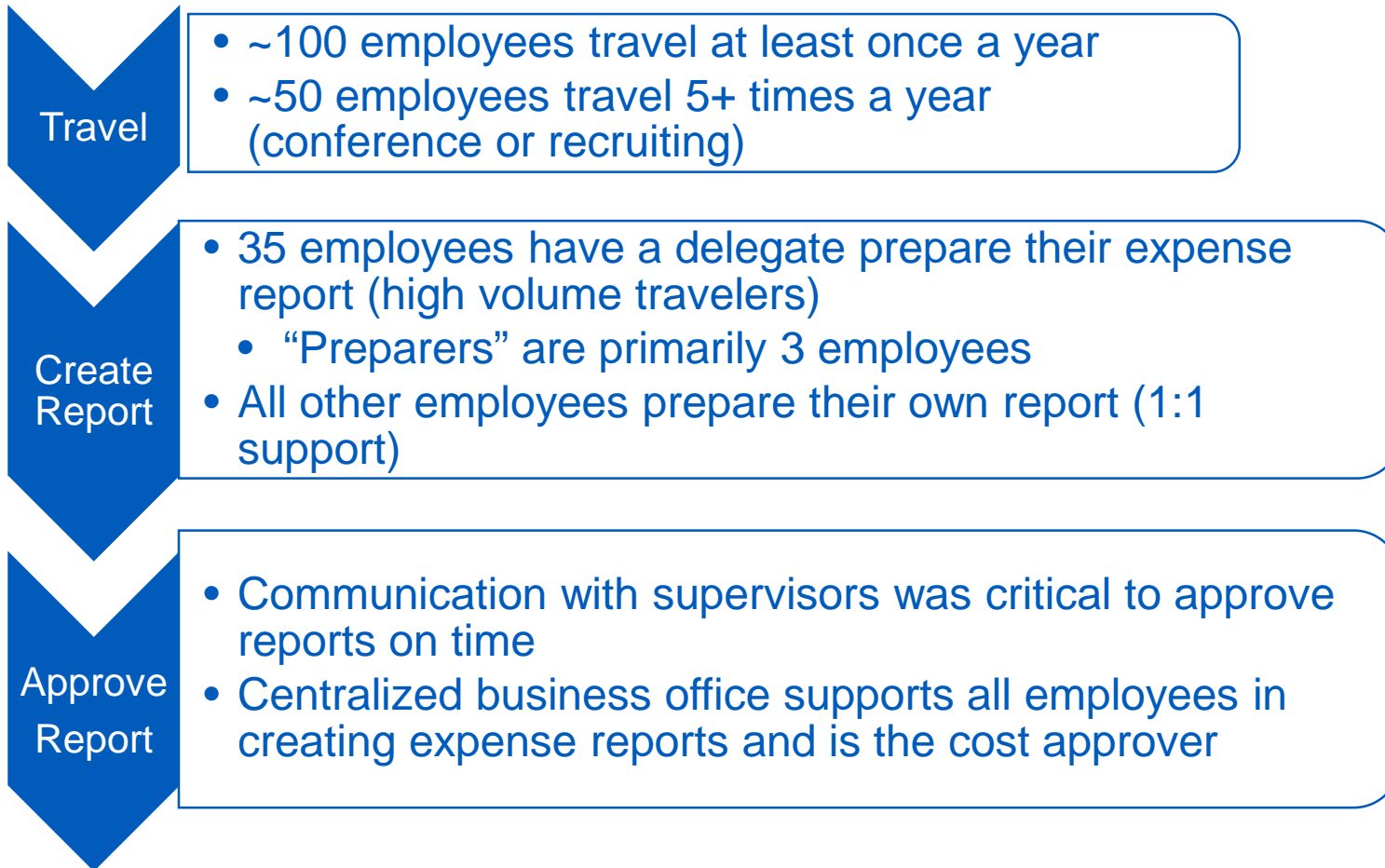
CONCUR IMPLEMENTATION PLAN

On-going:

- Continuing education on travel rules, Concur system, Concur mobile applications
- Troubleshooting and one-on-one support for new and current staff
- Buy-in on the new process



CONCUR EXPENSE REPORT PROCESS





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**MEGHAN PHIPPS,
SENIOR STAFF
ASSISTANT**

**SCHOOL OF SOCIAL
WORK**

OVERVIEW – CONCUR IMPLEMENTATION

- Pilot Group
- Roll-out
- Challenges and Solutions
- Results
- Questions



PILOT GROUP

- **Learning Phase**

- Submitted expense reports with faculty and staff and learned:
 - How to use the system
 - Identified areas that would create challenges (e.g. field mileage)

- **Workflow**

- Identified how expense reports move through the system
- Identified routing procedures (e.g. “grants”)



ROLL-OUT

- **Training Guide**
 - Created step-by-step instructions for travelers and approvers
 - Several sets of instructions for different traveling scenarios
- **Training Sessions**
 - Held multiple training sessions for faculty and staff
 - Completed group examples
- **One-on-One Meetings**
 - Met with individuals as requested
 - Had individuals prepare their own reports

CHALLENGES AND SOLUTIONS

Challenges	Solutions
<p>Impact Most SSW employees would need to use Concur.</p>	<p>Communication and Resources Group meetings, individual meetings, tools, etc.</p>
<p>Workflow Coordination Ensure supervisors sent reports correctly.</p>	<p>Communication and Resources Directly emailed, called, or met with supervisors and provided access to tools.</p>
<p>Infrequent Travelers Infrequent Concur users could easily forget processes developed.</p>	<p>Communication and Resources Directly emailed, called, or met with travelers and provided access to tools.</p> <p>Sent school-wide emails if multiple individuals needed clarification.</p>

RESULTS

Encouraged By the Outcome

- No longer require group training sessions
- Reduced one-on-one meetings



TRAVEL AND EXPENSE SYSTEM TRAINING

- Sign Up for a Travel Training Session
 - Go to buffalo.edu/business-travel
- Review Tip Sheets and Videos
 - Go to buffalo.edu/travel-expense-system
- Attend a Concur Training Class
 - 2 hour class
 - Overview of travel and expense system
 - Sign up in UB *EDGE*
- Attend a Concur Lab Session
 - 1 hour session
 - Bring your questions and expense documents
 - Sign up in UB *EDGE*

TRAVEL AND EXPENSE SYSTEM SUPPORT

1. Contact Your Department Liaisons

- Your liaisons are familiar with your department processes and can assist you
- Ask your unit business office who your liaisons are

2. Review Tip Sheets and Videos

- Go to buffalo.edu/travel-expense-system

3. Contact Business Services Customer Support

- Email: ubs-travel-expense-support@buffalo.edu
- Call: 716-645-4500, press 2 for travel and expense system
- Live Chat: go to buffalo.edu/travel-expense-system and click the *Live Chat* button



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THANK YOU!