Concur Service Advisory Board Meeting

Thursday Jan. 10, 2019


1. **Introductions**

2. **Draft charter and membership**

   We reviewed the draft Concur SAB charter and asked for suggested changes. The Board, chaired by Mark McCulloch and Laurie Jacoby, is advisory to the service owner (AVP Business Affairs) on matters related to travel procedure and software function. We decided to meet quarterly and post minutes on the travel webpage. We discussed service availability which provider SAP is responsible for. It was noted that Safari was no longer a supported browser.

3. **Draft decision making model**

   We reviewed the draft Concur SAB RACI model for roles and responsibilities and asked for suggested changes.

4. **New user interface**

   Brian demonstrated the new Concur user interface which must be implemented by all Concur clients eventually. It changes the look and feel of Concur Expense significantly. He suggested that we implement group by group in July and asked for a pilot group with a manageable number of travelers. We asked volunteers to contact Laurie and participate on **UI sub group** to create launch, communication and training strategy.

5. **Expenseit**

   Laurie described the new product add-on that will allow travelers (mobile) and delegates (PC) to scan a receipt and automatically itemize it on the correct trip report. Contracting is under way. Could be available to users in Feb/March. Should be a significant time saver for both travelers and delegates.

6. **Cost Object Approver**

   Brian described this feature, which allows expense reports to be approved by a user assigned to a cost object (index or fund or roll up org) on the expense report. This is an optional approval in addition to approvers assigned to the traveler. ORI and Education were interested.

   Laurie explained the use case where a traveler travels on a grant from a department other than their home department and the approver in the home department must manually forward the expense report to the grant department.
Brian also described a custom rule in place for International Affairs, which routes reports with certain index values to Katy for approval. Custom rules like this can serve as a ‘Cost Object Lite’.

Josh suggested that approvers be assigned to roles or groups of travelers instead of individual travelers so that when an approver for many employees is replaced, the new approver could be assigned the role instead of updating 75 employee profiles. BAO can easily update approvers using a template if all of the individual travelers are assigned to a group.

We asked volunteers to contact Laurie and participate on Cost Object sub group to evaluate the utility of this feature or custom rules in addressing existing approval gaps.

7. Request submission

Currently travelers must submit their own travel requests in Concur. Laurie described the use case where a department approves a travel budget and the delegate would like to submit travel requests on behalf of their traveler. Laurie expressed the importance of the request for duty of care and department planning. We asked volunteers to contact Laurie and participate on Request sub group to evaluate exceptions to the rule that the traveler must submit their own travel request.

8. Other Agenda Topics

No time remaining.