Welcome to Concur

A Faster, Easier Travel & Expense Experience for UTEP Employees



What is Concur?

Modern Travel & Expense Experience

SAP Concur is a travel and expense management platform designed to simplify travel planning, expense reporting, approvals, and reimbursements.

What Concur Brings to UTEP

Easier receipt documentation

Save, upload, and match receipts with less manual tracking.

- Receipts made simple
- E-receipts when booking through Concur
- Upload Receipts from Your Phone

3 receipt wins

Fewer forms & approvals

Reduce duplicate steps so the process feels easier to complete.

- Entertainment expense form reduced
- Mileage simplified
- International travel gets easier
- Reducing redundant approvals

4 process wins

Travel planning in one place

Keep travel booking and trip details connected in one system.

- Travel booking in one place
- Student travel made easier

2 travel wins

Faster expense flow

See transactions sooner and a smoother end-to-end experience.

- Travel card transactions sooner
- Enhanced user experience

2 speed wins

What Is NOT Changing

1

UTEP Travel Policies

2

Approval Workflows

3

Supporting Documentation Requirements

4

Grant Travel Receipt Requirements

5

PeopleSoft Payment Processing

6

Department Approval Responsibilities

The process remains the same. The experience is getting better.

What Campus Told Us

Before Configuring Concur, We Asked Campus Users For Feedback

Common themes included:

1. Returned Reports
2. Receipt Challenges
3. Too Many Forms
4. Manual Processes
5. Status Tracking
6. Mileage Complexity
7. Travel Card Delays
8. Expense Coding Confusion
9. Traveling Away from the Office
10. International Travel Challenges

Receipts Made Simple

Campus Feedback: Receipts were a major pain point in the survey. Users mentioned missing attachments, difficulty attaching documents, and reports being returned for receipt issues.

How Concur Helps

For expenses paid through a cost center, receipts are encouraged for all expenses but will only be required for transactions over $50.

If a receipt over $50 is lost, a Missing Receipt Declaration can be used. Missing Receipt Declarations are treated as a policy exception and routed for additional review.

If the expense is on a project/grant, receipts are required for all expenses regardless of the amount, and Missing Receipt Declarations cannot be used for project funds.

Example

You lose your parking receipt during a trip

- **If the expense is $35 and charged to a cost center:** You do not need a receipt.
- **If the expense is $75 and charged to a cost center:** You can complete a Missing Receipt Declaration and continue processing the expense report.



E-Receipts When You Book Through Concur

Campus Feedback: Delegates often have confirmations and receipts scattered across emails, booking sites, and paper receipts.

How Concur Helps

When travel is **booked through Concur** with participating vendors, invoices and receipts can appear in the traveler's profile as available expenses/e-receipts to add to an expense reimbursement.

Example

Reservations booked in Concur flow into the expense reimbursement automatically, delegates can begin preparing expense reimbursements before travel is completed. Additional costs, like gas or parking, can be added later.

Reports can be built anytime, but reimbursement comes only after the travel or event happens, a future conference registration is paid after the conference.

No more waiting until the entire trip is reconciled before getting everything submitted. Expenses can be processed as they become available.

Upload Receipts from Your Phone

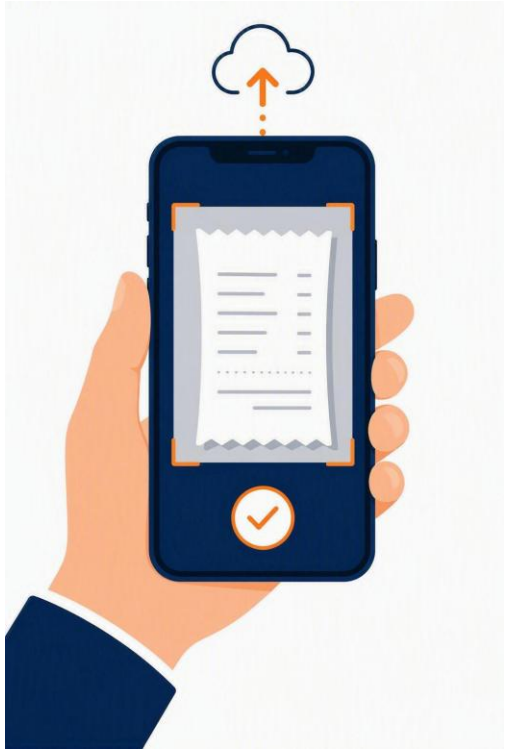
Campus Feedback
Receipts were one of the biggest pain points in the campus survey. Users described lost receipts, paper collected in a bag until the end of a trip, difficulty attaching documents, and expense reports returned for receipt issue.

How Concur Helps

- Take a photo of a receipt in the mobile app at the point of purchase
- It uploads to your Concur profile and waits as an available receipt
- Attach it to its expense line, clear required fields, and submit

Example:

At a conference, you take a photo of your parking receipts in the app. The photos are already in your profile, so you attach each one to its expense line and submit the same day instead of hunting for paper.



Making the Entertainment Expense Form Easier

Campus Feedback: Users want fewer forms and fewer separate external processes.

1

How Concur Helps

Concur will collect the required entertainment information **inside the system** through custom fields, eliminating the need for an external Entertainment Expense Form.

2

Example

If a department submits an entertainment meal expense, the needed details can be entered directly in Concur instead of attaching and routing a separate form.

Note: The Entertainment Expense Form is still required for Purchase Orders and Non-PO Vouchers.

Mileage Simplified

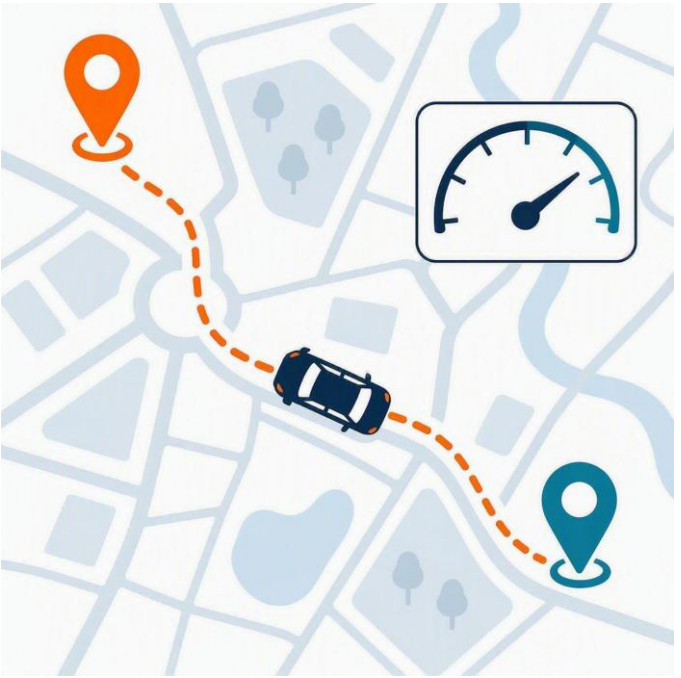
Campus Feedback: Travel mileage documentation can require extra work and attachments.

1 How Concur Helps

Concur has integrated Google Maps for mileage reimbursement, allowing users to enter starting and ending addresses so mileage can be calculated in the system.

2 Example

- No MapQuest printouts or odometer logs
- The creator enters the route details in Concur
- The system calculates the mileage



International Travel Gets Easier

Campus Feedback: International travel reimbursements can be confusing, especially when users must manage foreign rates and currency conversions.

1

How Concur Helps

Concur has integrated currency conversion, users will not have to create and attach a separate OANDA conversion document.

2

Example

If someone pays for a reimbursable expense in another currency, Concur can handle the conversion inside the system instead of requiring a separate currency conversion attachment.

Travel Requests Can Reduce Redundant Approvals

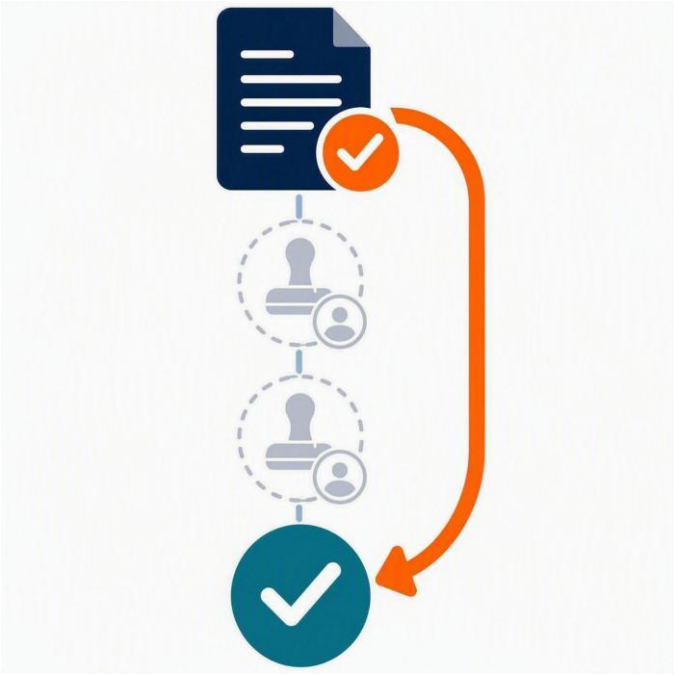
Campus Feedback: Approvers and delegates want fewer unnecessary approvals and less rerouting.

How Concur Helps

If expenses were approved during the travel request process and remain within the approved amount, the expense reimbursement will move directly to final review without additional approval.

Example

If the approved request included lodging and meals, and the final expense report is within those approved amounts, those items will not need the same approval again. If gas is added later, the additional item will route for approval.



Travel Booking in One Place

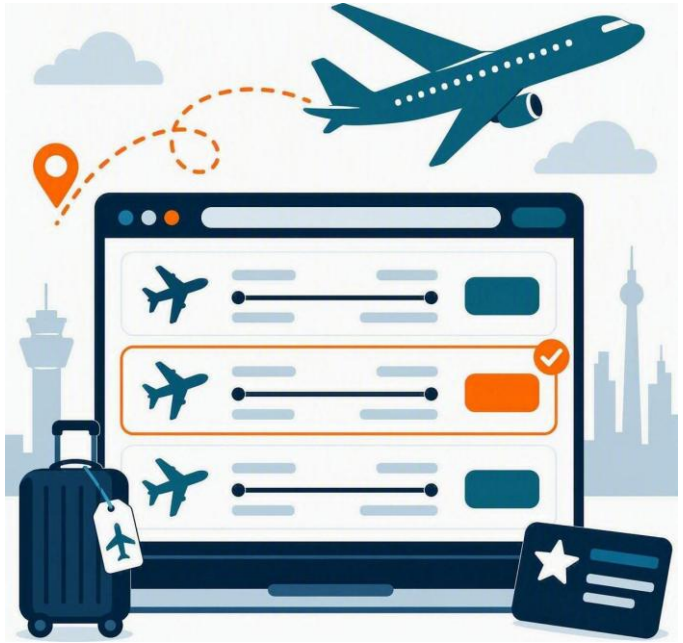
Campus Feedback: People want easier ways to compare travel options without jumping between sites.

How Concur Helps

- Compare flights from multiple airlines in one place, including dates, times, and fares
- International travel can be booked in Concur
- Concur also surfaces fares with more flexibility
- Add a loyalty number to keep earning points

Example

You're booking a trip to a conference in Chicago. Instead of going back and forth between the Southwest, United, and American sites to line up times and prices, you search once in Concur and see the options side by side, pick a flexible fare, and add your rewards number as you book.



Student Travel Made Easier

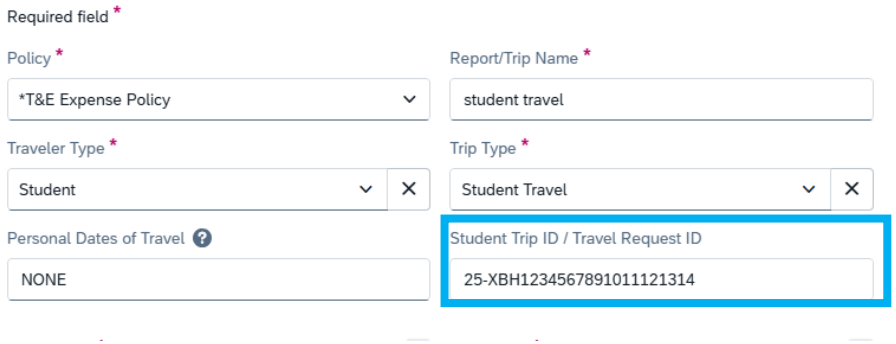
Campus Feedback: Departments requested a simpler way to connect student travel documentation with reimbursement records, making it easier to track and manage student travel-related expenses.

How Concur Helps

The Student Affairs travel approval process is not changing. Student Travel Registry requirements still apply.

Departments enter the student's Student Travel Registry Trip ID instead of uploading separate paperwork to link the report to the trip.

Example



US Bank Travel Card Transactions Appear Sooner

Campus Feedback: Reconcilers currently wait for statements, then rush to collect receipts and submit documents.

How Concur Helps

Travel Card transactions can populate into Concur after they post to US Bank, which allows reconcilers to work earlier instead of waiting for the monthly statement.

Example

Instead of waiting until the statement is available after the monthly cycle closes, a reconciler can begin reviewing card activity as transactions appear in Concur.



Note: This applies to Travel Card transactions only. The ProCard process is not changing.

Enhanced User Experience

Campus Feedback
Campus users pointed to returned reports, unclear requirements and expense coding, confusing receipt and hotel/per diem entries, and delays when reimbursements reroute and asked for clearer guidance.

How Concur Helps

Concur is configured to reduce send backs with required fields, quick tips, audit rules, receipt tools, policy exception justification fields, and built-in routing for exceptions.

Example

Concur flags missing items before submission instead of after. If an expense exceeds a policy limit, the justification is entered up front rather than after the report comes back.



Phased Roll-Out Plan

Implementation is sequences focused on training and support before go-live

Phase I

PILOT GROUP

- Athletics
- Business Affairs
- Research & Innovation
- Science

Phase II — All Others

COLLEGES

- Business
- Engineering
- Extended University
- Health Sciences
- Liberal Arts
- Nursing
- Pharmacy

DIVISIONS

- Office of the President
- Chief of Staff
- Enrollment
- Institutional Advancement
- Information Resources
- Marketing
- Provost
- Student Affairs

What Can You Expect Next?

From awareness to go-live, every milestone is designed to build confidence before users touch the system

Information Sessions
Campus-wide sessions explaining what's changing

Phase I Training
Hands-on training for Phase I participants

VIP 1:1 Training
Personalized sessions for high-volume users

★ Go Live — Phase I
Phase I divisions launch on Concur — VPBA, VPRI, COS, and Athletics

Feedback Survey
Phase I survey; insights refine Phase II rollout



How We Will Communicate

A multi-channel communication strategy keeps all stakeholders informed, prepared, and supported at every stage

Cabinet Briefing

Ensuring campus leaders are informed before broader communications launch

Leadership

Campus Email

Broad awareness campaigns, invitations, reminders, and launch updates reaching all campus users at key milestones

All Campus

Website

Central hub for timelines, FAQs, training materials, and resources, a single destination for everything Concur-related

Self-Service

Presentations

Campus-wide information sessions explain the upcoming changes, timelines, and training plans

Awareness

Training Sessions

- Hands-on preparation for Phase I will be conducted 2 week prior to roll-out
- Training for future phases will be conducted 2 week prior to roll-out

Targeted

VIP 1:1

Individual 1:1 sessions will be held with VPs and Deans to support a smooth transition

Targeted

Training & Support Model

Layered support includes group training, personalized 1:1 sessions, and ongoing drop-ins to ensure every user is ready before and after launch

Tier 1

Group Training

Phase I participants receive hands-on instruction in a structured group setting, building foundational confidence with Concur before go-live.

Tier 2

VIP 1:1 Training

Personalized support for high-volume or high-complexity users, tailored sessions ensure their unique workflows are fully addressed before launch.

Tier 3

Go-Live Drop-In Support

Virtual and in-person sessions available three times per week following the launch, ongoing assistance as users work live in the system.

Phase I Feedback Survey: Results will directly refine training materials and support resources ahead of Phase II go-live date.

Thank you!

Concur was designed to help you spend less time managing travel and expenses and more time focusing on teaching, research, service, **and supporting our students**.



Our Concur Site

Central hub for timelines, FAQs, training materials, and resources, a single destination for everything Concur-related

