



Concur Travel & Expense System

Townhall
Presentation
July 11, 2022

Agenda

Project Introduction

Project Scope

Project Timeline

Comments from Executive Sponsors

Project Team

Videos

Questions

Reasons and Rationale for Why the Change



SAFETY & SECURITY
SYSTEMS UPDATE
DEMANDS



LEGACY TRAVEL SYSTEM
BASED ON OUTDATED
TECHNOLOGY



CURRENT CLOUD
SOLUTIONS
ENHANCEMENT
UPGRADES



TIME SAVING PROCESS
IMPROVEMENTS



What's Changing - Areas of Enhancement



Integrated Travel Booking

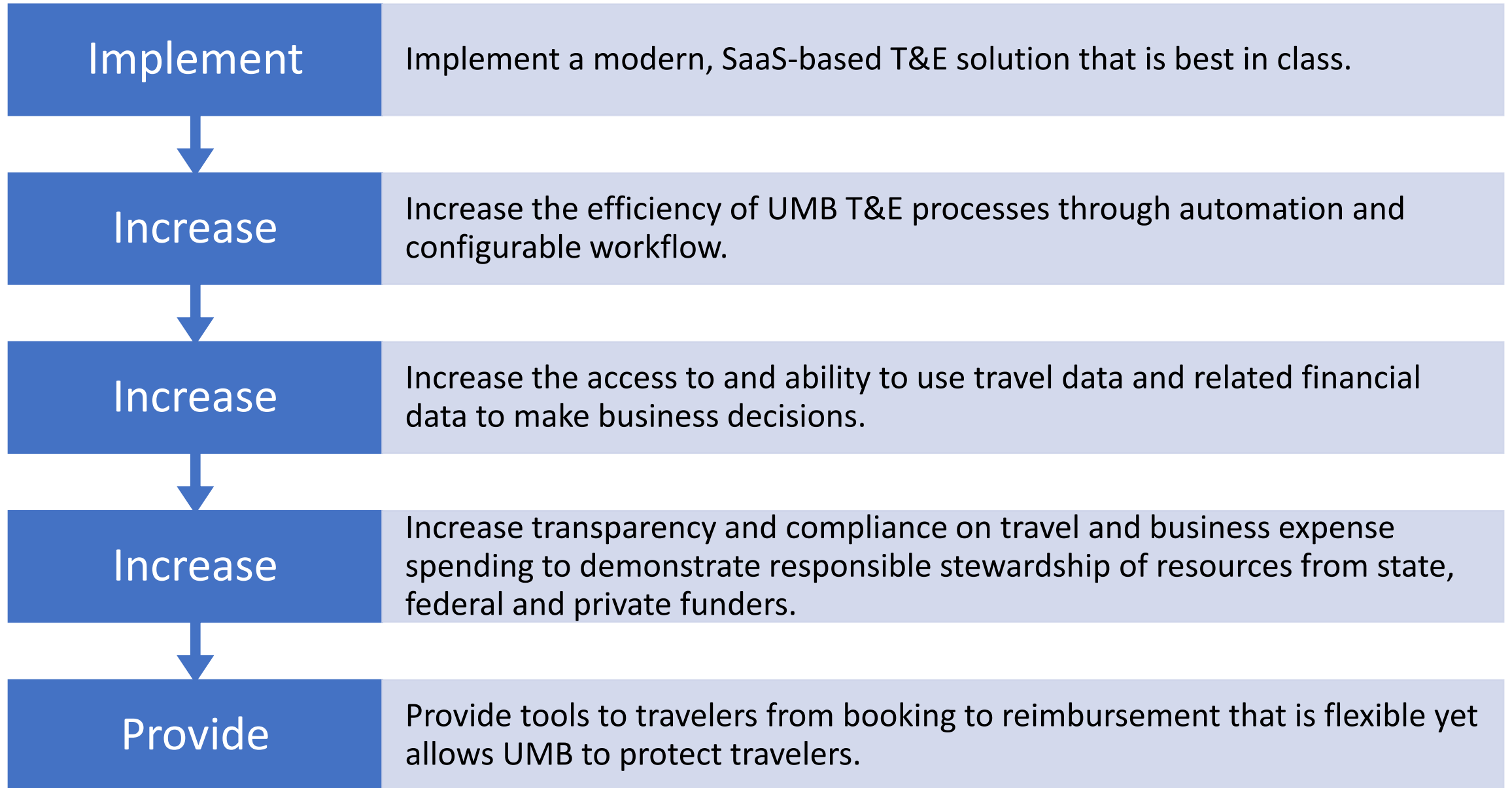
Multi-Level Workflow and Approvals

Integrated International Safety Management

Robust Reporting and Analytics Tool in Real Time

Mobile Travel Application

Scope of the Project



Scope of the Project

Reduce

Reduce UMB stakeholder reliance on supplementary systems to support their reporting.



Reduce

Reduce the effort, cost, and time to apply patches and upgrades that deliver new functionality.



Adopt

Adopt a flexible technology platform with a high degree of usability.



Adopt

Adopt a technology that provides users with the flexibility to access the system and accomplish work tasks via mobile platforms.

Benefits for Employees (end users)

Reduce the time spent making travel reservations

Minimize the hassle of getting reimbursed for expenses

Allow on-the-go capabilities through user friendly mobile applications

Provide pre-populated expense reports

In compliance with UMB policies and procedures

All Training will be on-line

Concur Experts available for user needs via Concur Helpdesk

Benefits for UMB

Drive travel and expense policy compliance

Gain better visibility to travel and expense spending

Unify the travel and expense process

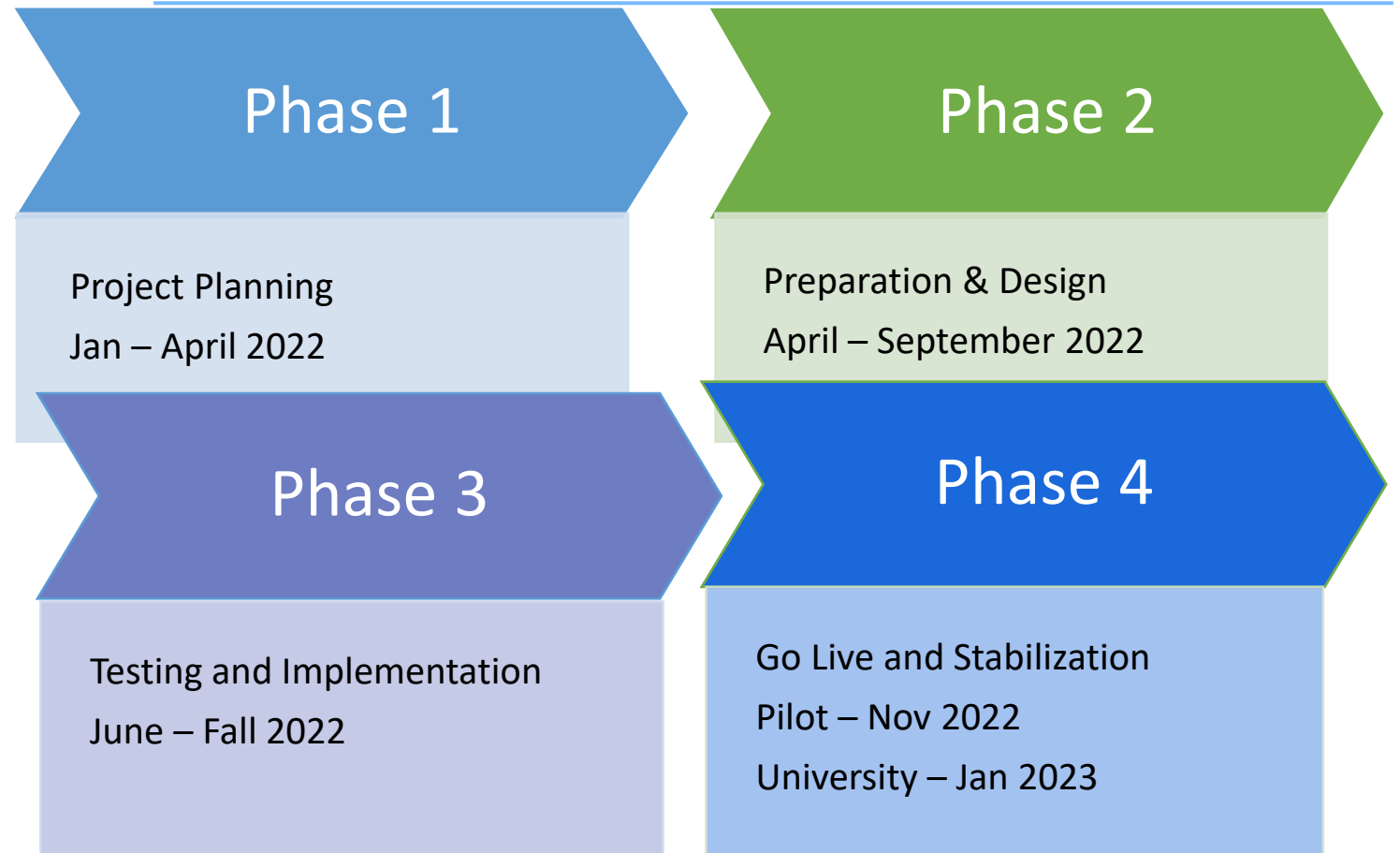
Eliminate the need to collect, manage and store paper receipts

Leverage our buying power with vendors

Fulfill our international safety responsibilities efficiently and effectively

Four Phase Project Approach

Project Timeline



Executive Sponsors



Campus Advisory Council

Cindy Lyons
Chair
OOTC

Michele Evans
Lead
CMAS

Beth Gallico
CMAS

Herty Cortez
Diaz
IOS

Virginia
Rowthorn
CGE

Teri Caughman
SON

Bill Cooper
SOP

Raymond
Dudeck
OAA/OAC

Andreas
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Dudeck
Grad School

Reetta Gach
EDI

Valerie Sikora
SOD

John Yurich
CASS

Louisa Peartree
SOM

Cheryl Fuller
SSW

Jane Allgair
ORD-E&ED

Central Office Functional Team

Luke Quell
Functional Project
Manager

Susan McKechnie
Lead

John Jensen
Lead

Alex Zouras-
Wieneke
OOTC

Lynell Griffin
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India Taylor
OOTC

Kerri Williams-
Tong
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Debbie Tatum
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Jennifer
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Training

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Analysis

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BA
Reporting

CITS Technical Team

Lakshmi Kinnera
Technical Project
Manager

Nagaraju
Daramukkala
Integration Lead

Laura Broy
Testing Lead

June Doerr
Security Lead

Raghu Guddanti
Integration Analyst

Subject
Matter
Experts
(SMEs) from
Schools/
Departments,
Business Unit

Bonnie Bissonette - CGE

Raymond Dudeck - OAA

Cheryl Fuller - SSW

Dean Glorioso - MCL

Shauna Guest - SOP

Kelli Sattler - SOM

John Yurich – CASS

Herty Diaz Cortez - MGIC

Foundational Project Decisions

In coordination with SMEs and Advisory Council, the following decisions have been made:

- Require an Approved Travel Request Before Booking Through Concur
- Require Air/Rail to be Booked Through Concur
- Travelers Will Only Be Reimbursed for Expenses After Trip
- Create Request Form for Business Expenses in Concur
- Remove Central Office Approval for Expense Reimbursements Meeting Certain Criteria (low dollar, low risk types)

SAP Concur Video Links

[Creating and Submitting a Request](#) – 2 min

[Booking a Flight](#) – 5 min

[Creating a Travel Expense Report](#) – 2 min

[Creating a Business Expense Report](#) – 2 min



Questions

