Concur Action Plan

Procurement Services
Summer/Fall 2014
Current State Assessment

Based on feedback from business offices, expense delegates, expense approvers and faculty we found the following areas of concern:

• Usability
• Policy and Audit rules
• Expense processing
• Approvals
Configuration-Audit Rules

• Performed a complete assessment of audit rules
• Determined which rule updates should enhance user experience without losing compliance
• Some examples:
  • Travel rules for travel booked in Concur
  • Travel related expenses when travel is booked in Concur
Configuration-Unused Features

- Performed an internal assessment of available features that might enhance the user experience
- Leveraged the service of Concur to conduct a site review
- Reached out to other Higher Ed institutions
- New features include:
  - Drop down list of employees for hosting attendee requirements
  - Saving allocations as favorites
  - Second Default Approver (optional)
  - Concur Mobile
Configuration-Field Updates

- Complete assessment of Concur fields, including possible modification of fields
- Approver/Audit can now update:
  - Allow approver to change transaction dates, allocations, department reference
  - Allow audit team to update transaction dates
- Modified copy down feature:
  - Business Purpose at Report Header
  - Copy down of Domestic/Foreign
Configuration-Expense Types

• In the process of assessing all expense types
• Expense types that are not necessary will be inactivated, this should reduce some confusion
• Updating the expense type with the associated account number
Concur User Interface

Key findings

The current usability improvements are focused around the home page experience for end users. Some key points:

- Effortless navigation and Improved graphics
- Drag and drop feature
- Grouping of functions and tasks
- New Dashboard
- Enhanced Expense landing page
- Booking enhancements
Concur Home Page
Concur Expense Landing Page
Questions?

• Contact Carolyn Blankenship (cblanken@umich.edu)