Concur: November 2010 Roll-Out
Unit Liaison Meeting – September, 2010

How is Concur Rolling Out?

1. Pilot Population –
   October 15, 2009 - 10%
2. ITS –
   April 15, 2010 - 1%
3. Health System & Development –
   July 15, 2010 – 32%
4. Schools & Colleges –
   November 15, 2010 – 35%
5. Remaining U-M Employees –
   February 15, 2011 – 22%
Road Map to Roll-Out
Key Dates & Activities

- **BAG Presentation** – August, 2010
- **UL Presentation** – September, 2010
- **Executive Unit Readiness Sessions** – week of September 13, 2010
- **Unit Readiness Sessions** – weeks of October 4 & 11, 2010
- **Interchange Sessions** – weeks of November 1 & 8, 2010
- **Brown Bag Sessions** – weeks of December 6 & 13, 2010

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**Purpose:** Preliminary presentation to provide unit administrators information regarding:

- Key roll-out dates
- Roll-out activities and when these occur
- Populations who should attend specific activities
- Concur communication messages
- Initial unit action items
- Provide opportunities to ask questions

**Audience:** BAG & UL Members
Executive Unit Readiness

- **Purpose:** Designed as a preview for unit leadership charged with redesigning unit business process and policy in line with Concur changes
  - Information on Concur system and significant changes provided
  - Time provided for questions and answers
- **Audience:** Unit leadership (2-5 participants/school)
- **Timing:** Two Executive Unit Readiness Sessions
  - Monday, September 13, Palmer Commons Forum Hall, 9-11 a.m.
  - Wednesday, September 15, Palmer Commons Forum Hall, 1-3 p.m.

Unit Readiness

- **Purpose:** Designed for unit team(s) charged with redesigning unit business process and policy in line with Concur changes
  - Information on Concur system and significant changes provided
  - List of specific transition activities to complete
  - Time provided for questions and answers
- **Audience:** Unit team(s) & “power users”
- **Timing:** Multiple presentations between October 1 - 15
Interchanges

• **Purpose:** Preview of Concur system information and key tasks for approvers, delegates, and employees creating expense reports or arranging travel – system demonstrations provided
  • Time provided for questions and answers
  • **NOT** a “training” session – approvers, delegates, and/or employees should still be encouraged to take eLearning courses
• **Audience:** Unit approvers, delegates, and employees
• **Timing:** Multiple presentations between November 1-15

Go Live

• Unit employees receive Concur system access
• Login via
  *Wolverine Access > University Business > Travel & Expense*
• No OARS access-related tasks for Unit Liaisons
• No access prior to November 15, 2010 – precise system cut-over at end of P-Card Cycle
• **Audience:** All unit employees
• **Timing:** November 15, 2010
Brown Bags

- **Purpose:** Coaching session designed to respond to approver, delegate, and employee questions on creating expense reports or arranging travel - system demonstrations provided
  - Almost entirely question and answer based
  - **NOT** a “training” session – approvers, delegates, and/or employees should still be encouraged to take eLearning courses
- **Audience:** Unit power users or team leads
- **Timing:** Multiple presentations between November 29 – December 19

Concur Communications Plan

Concur has three types of communication messages:
- Role-based messages (sent by project)
  - Dept Manager
  - P-Card Roles
  - Non-PO Voucher Role
  - Go Live Announcement – all employees
- Project/event messages (triaged through unit)
  - Unit Readiness
  - Interchanges
  - Brown Bag
- Unit-wide messages
  - Go Live Announcement
Concur Coordination Model - Pilot

Pilot roll-out utilized Steering Committee representatives as the single point of contact for each organization.

(School & College) Concur Steering Committee Members

LSA  Social Work  Dental School  School of Info.  Medical School

4000+ U-M Employees in Concur Pilot

Concur Coordination Model – Health System

The Health System roll-out utilized a single point of contact for the organization

Pat Ridenour  UMHS Comm Lead

20  UMHS Implementation Leads
200 Unit Leads

20,000+ UMHS Employees
Concur Coordination Model – November 2010 Go Live

Each unit needs to identify a lead for the Concur Project team to communicate and collaborate with:

- Unit Lead
- Unit Comm Lead

Additional Unit Implementation Leads (based on size & need)

All Unit Employees

Unit Lead Roles

1. Participate in the planning & execution of key Concur sessions:
   - Executive and Regular Unit Readiness
   - Interchanges
   - Brown Bag Sessions
2. Assemble appropriate roll-out team
3. Coordinate unit roll-out activities
4. Coordinate project communications (or assign a communications lead)
   - Receive
   - Forward
5. Oversee completion of all Unit Readiness activities
6. Serve as key contact/conduit to Concur Project Team
7. Validate unit Department Group/ID/employee listings
Concur Training Resources

• My LINC Home Page - http://maislinc.umich.edu/
• Search Term – Concur Training

• Procurement Web Site: http://www.procurement.umich.edu/travelexpense.html
• Procurement Solutions Team 734-764-8212, Option 1 procurement.services@umich.edu

Thank You for Your Time Today