UTA Division of Business Affairs

Change Guide for Concur

Division of Business Affairs

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Purpose of the Guide

The purpose of this guide is to help departments navigate a smooth transition for faculty and staff as they begin using the Concur Travel, Expense, and Booking application on November 4, 2024.

Overview of the Change

The following business processes will be moving from UT Share to Concur beginning November 4, 2024.

- Travel requests
- Cash Advance requests
- Travel Expense Report requests
- Non-Travel Expense Report requests
- Travel and airfare cards
- ProCard Reconciliation

Learn More About the Change

Attend an Information Sessions

There are multiple dates to attend an information session to help you prepare for the change. The project team will be presenting information and answering questions during these sessions at the following days and times.

- Join here on September 9, 2:00pm
- Join here on September 19, 11:00am
- Join here on October 11, 1:00pm
- Join here on October 29, 10:00am

Join the support channel

Business affairs has a Teams channel where information is posted and you may ask questions. Join this channel to receive the most up to date communications from the team about the change.

- Join the Travel & Expense and AP Knowledge Center Team
- Join the ProCard Team

In this Guide

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- Who is impacted? Impacted Roles and Responsibilities
- Change Checklist
- Training Resources

Implementation Schedule

As we prepare for the transition to the Concur Travel, Expense and Booking application, it's important to be aware of key dates and actions to ensure a smooth implementation.

The Go Live for travel and expense authorization with Concur is scheduled for November 4, 2024.

Below are key dates during the implementation:

Date	Action
October 11, 2024	**Cash Advance Cutoff Until November 4.** Request a Travel Card by October 11 if a Cash Advance is needed during the period of October 21 – November 4. No Cash advances will be issued during this period.
October 18, 2024	**Travel Requests & Expense Reports Deadline** Final day to submit a 2024 travel requests or expense report in UTShare. 2025 travel requests will need to be submitted in Concur after November 4.
October 18, 2024	**Approved Report Deadline** All 2024 travel requests and expense reports must be fully approved to Disbursements. Any reports not fully approved will need to be re-submitted in Concur starting November 4.
October 21, 2024	**Training Opens** Required Concur training course available in Canvas. All impacted individuals must complete training to gain access to the system.
October 21, 2024	**Systems Blackout Period Begins – Limited T&E Operations** **Access to UT Share Travel & Expense Module switches to View Only** You will no longer be able to create or modify a travel authorization or expense report in UT Share. Temporary access may be granted for special scenarios such as travel card transaction reconciliation. The disbursements team will contact and manage access for individuals during the blackout period. If **urgent travel** is required during the blackout period, you will Use the Supplemental Travel Authorization (STA) form for bookings and travel during this period. Airfare and rental cars should be booked through CTP or an ATI agent. **Cash advances** will not be processed during this time; request a travel card by October 11 if needed.
November 4, 2024	**New System goes Live** Expanded travel suite of SAP Concur available via web and mobile application. All travel authorizations and expense reports and ProCard reconciliations must be processed through Concur moving forward.
November 5, 2024	The final file for travel card and ProCard transactions for billing cycle 10/4-11/3 will be loaded into UTShare.
November 18, 2024	**ProCard Reconciliation Deadline** All ProCard transactions must be reconciled
December 9, 2024	ProCard transactions will be reconciled in Concur moving forward, starting with 11/4-12/3 billing cycle

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Who is Impacted?

The transition to Concur will impact various roles within the organization. Please review the roles that are impacted below.

Communicate and Support: Provide necessary support and resources to all impacted team members. Ensure they aware of the upcoming changes, key dates, and training requirements.

Role	Description	Responsibilities
Travelers	Individuals traveling on behalf of UTA	Complete required Concur training. Submit travel requests and expense reports by October 18. Use Concur for all travel and expense activities starting November 4.
Travelers with Travel Cards	Individuals traveling with a university-funded card	Complete required Concur training. Reconcile travel card transactions by October 18. Use Concur for managing travel card expenses starting November 4.
Individuals with ProCard	Persons making ProCard charges on behalf of UTA	Complete required Concur training. Ensure all ProCard charges are reconciled by October 18. Use Concur for ProCard expense management starting November 4.
Administrative Support/Delegate	Individuals granted permission to assist travelers with requests, bookings, and expense reports	Assist travelers/cardholders with travel and expense reports due October 18. Complete required Concur training. Support travelers in using Concur starting November 4.
Supervisor Approver	Individuals approving time spent on the trip	Complete required Concur training. Approve travel and expense requests by October 18. Use Concur for approving travel and expense activities starting November 4.
Funding Approver	Individuals approving the amount to come from the cost center	Complete required Concur training. Approve funding for travel and expense requests by October 18. Use Concur for approving funding starting November 4.
Travel Expense Recipient	Individuals receiving travel-related reimbursements	Complete required Concur training. Ensure all travel-related reimbursements are processed by October 18. Use Concur for travel-related reimbursements starting November 4.
Expense Recipient	Individuals receiving non-travel-related expense reimbursements	Complete required Concur training. Ensure all non-travel-related reimbursements are processed by October 18. Use Concur for non-travel-related reimbursements starting November 4.

Preparing for the Change

Complete the checklist below to help departments navigate the transition to Concur. Select one or two individuals who can facilitate and support employees in your area throughout the change, ensuring a smooth transition.

This checklist should help ensure a smooth transition for everyone involved.

☐ **Identify Impacted Individuals:** Determine who in your area will be affected by the transition.

☐ **Communicate the Change to your team:** Share the implementation schedule, impacted groups, and training and support avenues. The project team has created the information areas below to help you share this information with your team.

- About the Concur Change PowerPoint (you may use this PowerPoint in discussion with your teams)
- Project Website (the project website has information about the change)
- Join the Travel & Expense and AP Knowledge Center Team
- Join the ProCard Center Team

☐ **Prepare for the Transition**

- Review and update any departmental processes to align with the new Concur system.
- Submit and approve 2024 travel and expense requests by October 18.
- Communicate with individuals you support to ensure they meet the October deadlines.
- Ensure all team members are aware of and understand the processes.
- Be prepared for limited access to UTShare from October 21 to November 4.
- Use Supplemental Travel Authorization (STA) forms for urgent bookings and travel during the limited access period.

☐ **Complete Training Course:** Ensure team members are aware of the required Concur training course available in Canvas starting October 21, 2024. Encourage them to complete the training.

☐ **Access Support and Resources**

- Know how to get help during the transition period (e.g., contact Disbursements for assistance).
- Visit the Concur project website for more information and resources.
- Reach out to the project team at UTAConcur@uta.edu for any questions or additional support.
- When the system launches on November 4, support tickets can be opened in ServiceNow.

Training and Support

All employees will be auto-enrolled in training. The training will be available in Canvas beginning October 21, 2024. To gain access to the system, training **must** be completed.

Live labs, where you can meet with members of the Knowledge Services team and get your questions answered in real time after November 4, are offered at the following days and times in Trinity 104:

Monday, November 4, 2:00pm – 4:00pm
Tuesday, November 5 10:00am – 12:00pm
Thursday, November 7, 9:30am – 11:30am
Tuesday, November 12, 10:00am – 12:00pm
Wednesday, November 13, 2:00pm – 4:00pm
Thursday, November 14, 2:00pm – 4:00pm