



Pilot Training Approach Executive Summary – The Concur Project - Summer, 2009

U-M Procurement Services, 2009

Major Considerations



1. Why eLearning?

- ▶ 50,000+ employees – too large to do instructor led training
- ▶ Training needed by initial group of power users, P-Card holders, and frequent travelers on Day 1
- ▶ Training needed by other employees piece-meal
- ▶ ELT provides “on demand” options

2. Voice-Over vs. Non-Voice-Over Simulations

- ▶ Voice-over simulations for tasks that ALL employees must do for themselves
- ▶ Designed for those who need extra help or might consider themselves “above” training

3. Balancing Act

- ▶ Provide “just enough” detail to help the first time user, but not overwhelm them with process or policy
- ▶ Simulations for all complex tasks, documentation for “one-offs”

Three Populations



1. Mandatory Faculty/Staff Tasks
 - ▶ Employees must do for themselves
 - ▶ Delegates cannot do for them (could coach)
 - ▶ Materials: documentation and voice-over simulations (Based on SA/HR experience)
 - ▶ “Quick Start” Links on HTML page
2. Employee (Delegate) Tasks (Optional)
 - ▶ Setup, booking travel, and expense reporting tasks
 - ▶ Materials: documentation & simulations
 - ▶ Framed Within: 1 hour end user eLearning course
3. Approver Tasks (Required)
 - ▶ Expense report approval tasks and relevant U-M Business Process & Policy
 - ▶ Materials: documentation & simulations
 - ▶ Framed Within: 30 minute approver eLearning course

Two eLearning Courses

Concur User

- ▶ Content
 - ▶ Booking Travel
 - ▶ Creating Expense Reports
 - ▶ Managing Receipts
 - ▶ Notification for submission
- ▶ Recommended for:
 - ▶ Those booking their own travel and/or creating their own expense reports
 - ▶ Those designated as a delegate

Concur Expense Approver

- ▶ Content
 - ▶ Approval notifications
 - ▶ Approval processes
 - ▶ Cash Advances
 - ▶ Expense Reports
 - ▶ U-M approval policies
- ▶ Required annually

New Procurement Front Page

- ▶ New catalog
- ▶ Single category
- ▶ Room to grow
- ▶ Highlighted resources
- ▶ Direct users to HTML “wrapper”
- ▶ Available to all employees

The screenshot shows a web interface for 'Welcome Amy Peters'. At the top right, there is a search bar with a 'Help' link and a 'GO' button. On the left side, there is a vertical navigation menu with buttons for 'HOME', 'HRD', 'MAIS', 'Procurement' (which is highlighted), 'Concur', and 'Treasurer's Office'. The main content area is titled 'Procurement Services Catalog List' and contains the following text: 'New! Procurement Services offers training materials for Concur Pilot participants online.' Below this, there is a 'Recent Updates' section with two bullet points: 'Employees are able to learn about booking travel and creating expense reports in Concur. Click [here](#) to launch the new employee eLearning course.' and 'Approvers are able to complete required annual approver training. Click [here](#) to launch the new approver eLearning course.' There is also a 'Top Resources' section with one bullet point: 'Concur Training and Resources page provides a complete listing of all Concur training materials, including "quick start" tasks that all employees need to complete, eLearning courses, simulations, and step-by-step procedures.' A 'Note' follows: 'Employees not participating in the Concur pilot should click [here](#) to locate P-Card or Non-PO Voucher materials in the MAIS My LINC catalog.' At the bottom of the main content area, there are two links: 'USING MY LINC' and 'CONTACT US'.

Concur Training & Resources

My LINC

- ▶ *Concur Training and Resources* page is the gateway to:
 - ▶ eLearning courses
 - ▶ Simulations
 - ▶ Procedures
 - ▶ “Quick Start” materials at the top

UNIVERSITY OF MICHIGAN
TRAVEL & EXPENSE SYSTEM

Concur Training and Resources

Concur Tasks

Click the appropriate link below to jump to a specific section of the page.

- ▶ [Modifying Profiles](#)
- ▶ [Booking Travel](#)
- ▶ [Creating Expense Reports](#)
- ▶ [Approving Expense Reports](#)
- ▶ [Managing Cash Advances](#)
- ▶ [Concur Courses](#)
- ▶ [Additional Resources](#)

ANNOUNCEMENTS

Concur is being piloted with select campus users, starting on October 15, 2009. The date on which Concur will be rolled out to campus is subject to the success of the Pilot.

Quick Start

Quick Start materials are for the tasks that all U-M employees are required to do for themselves in Concur. (e.g. Delegates are unable to complete these tasks on behalf of other employees.) Quick Start simulations contain audio to assist you in understanding these key tasks. These materials are also available in the applicable task boxes below.

- Modify a Concur Expense Profile**
[Procedure](#)
[Simulation \(contains audio\)](#)
- Modify a Concur Travel Profile**
[Procedure](#)
[Simulation \(contains audio\)](#)
- Submit a Concur Expense Report Prepared by Your Delegate**
[Procedure](#)
[Simulation \(contains audio\)](#)

Concur Training & Resources

Procurement Services Website

- ▶ Concur business process information
 - ▶ P-Card cycle
 - ▶ Expense Type > M-Pathways Account mapping
 - ▶ http://www.procurement.umich.edu/travel_expense-sys.html
- ▶ Concur best practices / Frequently asked questions

U-M TRAVEL AND EXPENSE	<p>Welcome to the new U-M Travel and Expense web site. The information on this site will be updated frequently over the coming weeks, so please check back often. We will post updated FAQs, new forms, travel tips and resources, and more as we move closer to the roll out of the new Travel and Business Hosting Expense Policy on October 15, 2009.</p> <p>Travel and Expense Initiatives for 2009-2010 Two related initiatives are under way to improve the University travel and expense reporting process: a revised Travel and Business Hosting Expense Policy, and the implementation of a new travel and expense system (Concur) to support the new policy. See below for more information on each initiative.</p> <p>Making a Smooth Transition The new Travel and Business Hosting Expense Policy applies to all faculty, staff, students, and guests effective October 15, 2009. However, the Concur Travel and Expense System is being implemented in phases, and thus not all faculty and staff will be using Concur at the same time. We therefore will have a period of time when some faculty and staff will be using Concur, and others will use the current business process and system (M-Pathways) for travel, hosting, and other expense reporting.</p> <p>To assist faculty and staff in determining which policies, systems, forms, and training apply to them during the transition to the new travel and expense system, we refer on this web site to two populations: Concur Users and Non-Concur Users. Units that are not yet live in Concur should use documents, forms, and training resources for Non-Concur Users. See the document Concur vs Non-Concur Users for an overview of the systems, roles, and forms used by each population.</p> <p>New Travel and Hosting Policy Standard Practice Guide The new travel and hosting policy will be published in the University's <i>Standard Practice Guide</i> (http://spg.umich.edu) in October 2009. Because we are committed to introducing the revised policy with minimal interruptions to departmental operations, we have provided on this web site pre-publication copies for your review (see links at right under New Travel & Hosting Policy).</p>	<p>FAQs Travel & Hosting Policy Concur</p> <p>News & Events Fall 09 Customer Forums</p> <p>Questions? Contacts</p> <p>Travel & Hosting Policy Current Policy New Policy (Concur Users) New Policy (Non-Concur Users) Overview of Changes</p> <p>Travel & Expense System Concur Travel and Expense</p> <p>Travel P-Card Program Air Travel Car Rental/Rail/Bus Other Travel Expenses Lodging Mileage International Travel Event ID Number Non-Employee Travel</p> <p>Travel Resources International Travel Info & Registry Benefits Office Research & Travel Domestic per diem rates Foreign per diem rates</p>
-------------------------------	--	---

Questions?

 UNIVERSITY OF MICHIGAN
TRAVEL & EXPENSE SYSTEM