

## Laura Shannon Virgil

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**From:** Bobbi A McCracken  
**Sent:** Thursday, July 21, 2022 8:09 AM  
**To:** (saa-announce@lists.ucr.edu)  
**Cc:** Impact23  
**Subject:** Re: [SAA-announce] SAA Announcement: New Concur Travel System is Launching on July 25!

Dear Department SAAs,

This is a friendly reminder about tomorrow's meeting to discuss Concur roles and routing in EACS in preparation of the July 25<sup>th</sup> deployment. Please see Zoom link below.

Bobbi

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**From:** SAA-announce <saa-announce-bounces@lists.ucr.edu> on behalf of Bobbi A McCracken <bobbi.mccracken@ucr.edu>  
**Sent:** Tuesday, July 12, 2022 5:37 PM  
**To:** (saa-announce@lists.ucr.edu)  
**Cc:** Impact23  
**Subject:** [SAA-announce] SAA Announcement: New Concur Travel System is Launching on July 25!

Dear Department SAAs,

Please see the announcement below regarding the deployment of Concur Travel & Expense on Monday, July 25, 2022. The Concur system will require new role assignments and Concur specific travel routing. To prepare for a smooth transition, the Impact23 team is hosting a 1-hour information session for Department SAA to go over the new Concur roles & responsibilities, training requirements, and provide a brief overview of actions required in EACS to set up travel roles and approval routing.

**SAA Readiness Session - Concur Access in EACS**

**Date:** Friday, July 22

**Time:** 10:00-11:00 am

**Join Zoom Meeting:** <https://ucr.zoom.us/j/98572301821>

Your attendance is strongly encouraged.

Sincerely,

Bobbi

Associate Vice Chancellor and Controller  
Business & Financial Services

<http://bfs.ucr.edu/>



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**From:** Msoadm <msoadm-bounces@scotmail.ucr.edu> **On Behalf Of** Asirra Suguitan  
**Sent:** Tuesday, July 12, 2022 1:49 PM  
**To:** msoadm@scotmail.ucr.edu  
**Subject:** [Msoadm] New Concur Travel System is Launching on July 25!

## **Concur Travel and Expense, UC Riverside's new travel system, will deploy campus wide on July 25, 2022.**

The Impact23 program is pleased to announce the deployment of the Concur Travel and Expense system in just a few short weeks. Concur is the first system in the campus' multi-year initiative, Impact23, to update many of our aging administrative systems. This milestone is more than eight months in the making and has involved participation from staff members and pilot departments across the campus. Concur is successfully used by many UC campuses. As part of this transition, UC Riverside will leverage features available in Concur to reduce out-of-pocket expenses and improve administrative efficiencies by upgrading the university's US Bank Travel & Entertainment Card Program (T&E Card). The T&E Card program will transition from personal liability to a corporate-liability card program (details below).

To ensure a smooth transition for users, our Concur workgroup and our pilot departments processed various transactions to ensure a variety of scenarios are flowing through the system as expected and enabled the project team to update guidance based on lessons learned during the pilot to more effectively roll out Concur to the campus. Instructor-led training and communications will continue, with Travel Arranger [training sessions](#) available to provide UC Riverside faculty and staff with increased levels of support. Reference guides will be made available for Travelers and Approvers when Concur deploys.

### **Important Reminders**

- A transition period will be in effect to allow existing trips to be closed out in iTravel.
  - The iTravel system continues to be available until 9/1/2022 to process previously entered requests after Concur is deployed.
  - Upon go-live on 7/25/2022, all new travel requests and expense reports should be entered in Concur.
- Departments should work with travelers to request new corporate T&E Cards as soon as Concur is deployed. Although current US Bank T&E Cards (personal liability) will remain active after the Concur deployment, new purchases on the US Bank personal liability cards will be restricted on approximately 10/1/2022. This date will be communicated to existing cardholders.

### **What You Should Know**

**Who is Impacted?** All faculty, staff, students, and guests traveling on University business and individuals that support travelers on behalf of the university. Everyone who travels, has a T&E Card, or supports employee/non-employee travelers (students, guests) will need to interact with the new travel system. Please spread the word and make sure you are ready!

### **What are the most notable changes that will be implemented with Concur?**

- UC Riverside employees (or their delegate Travel Arranger) are expected to submit Pre-Trip Requests in Concur to estimate expenses a traveler may incur for all domestic and international travel and mileage-only reimbursements. An approved pre-trip request is required before an expense report can be approved. This change is considered an industry best practice and has been effectively utilized by other UC campuses. [Learn more about pre-trip requests.](#)
- While Travel Arrangers can support the preparation of transactions in Concur, only employee travelers can electronically submit card requests, expense reports (travel reimbursements), and missing receipt declarations.

**How do I apply for a new T&E Card?** If you travel on behalf of the university, apply for the new corporate liability T&E Card:

- Cardholders must complete the required online [T&E Card training](#) in UC Learning
- Acknowledge cardholder responsibilities
- Initiate a new online application in Concur once the system is deployed

[See Travel & Entertainment Card Requests](#)

**How can I prepare for Deployment?**

- Take [UCR Travel and Expense](#) training and orient yourself with the [support options](#)
- Once campus availability is announced, coordinate with your System Access Administrator (SAA) to provision appropriate roles in EACS for your accountability structure
- If you are a current T&E Card cardholder, complete the new corporate liability T&E Card training and pay off existing balances before applying for a new card

Keep an eye out for the official Concur Travel and Expense launch announcement, more information about office hours, and survey opportunities to inform Concur adoption, stabilization, and support efforts.

Sincerely,  
Asirra Suguitan  
on behalf of the Impact23 Steering Committee

