

Concur Invoice

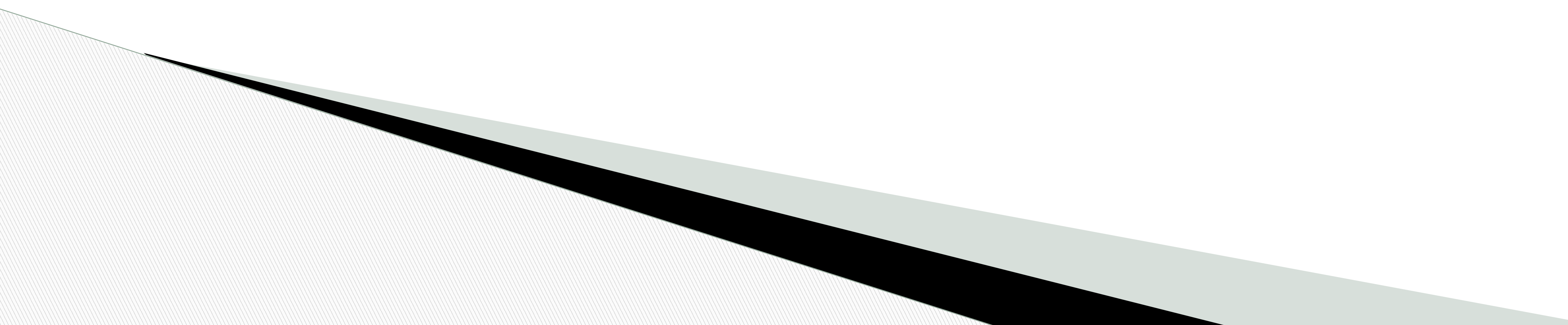
Information Session

December 2017

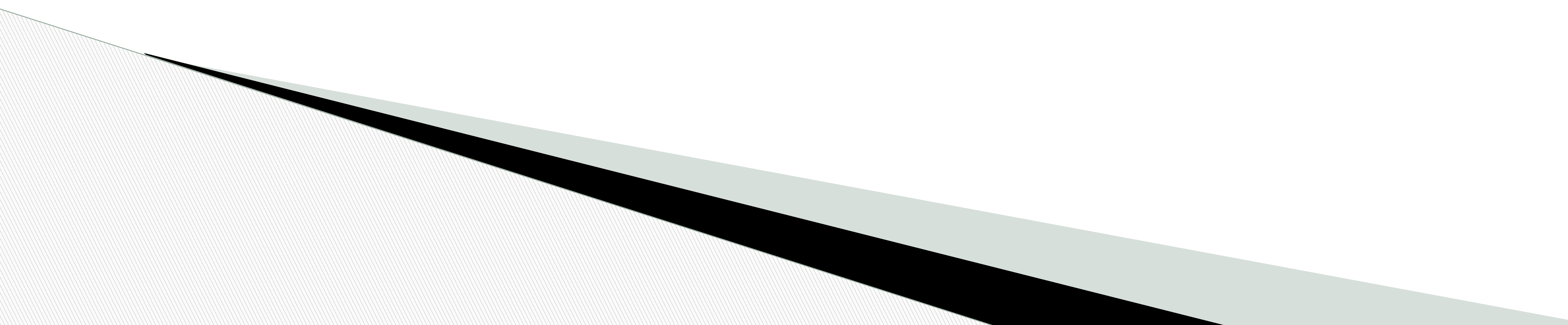
Topics

- ▶ Project Overview
- ▶ Process Changes
- ▶ Concur Sneak Peek
- ▶ Next steps
- ▶ Questions

Implementation Team

- ▶ Tammy Walters (A/P Manager)
 - ▶ Karen Gdula (A/P Coordinator)
 - ▶ Drew Daniels (Business Systems Analyst)
 - ▶ Russell Blanton (Information Tech Analyst, Sr.)
 - ▶ Doris Celian (Controller)
 - ▶ Travis Temeyer (Interim, Director Purchasing)
 - ▶ Kenneth Adkins (Director, Business Systems Support)
- 

Deficiencies of Old system

- ▶ Lost invoices
 - ▶ Time spent searching for outstanding invoices
 - ▶ Manual delivery of paperwork
 - ▶ Incomplete documentation
 - ▶ Lack of approval workflow
 - ▶ Inconvenient to obtain copies of past payments
- 

New Invoice Process



- ▶ Vendor sends invoice via email to Concur
- ▶ Concur creates a Payment Request
- ▶ Department designee will review the Payment Request
- ▶ Approver will Approve Payment Request in Concur
- ▶ Accounts Payable will process payment

Advantages of New Invoice Process

- ▶ Allows better tracking of invoices
- ▶ Reduces late payments
- ▶ Utilizes the foundation of Concur approval queues
- ▶ Reduces Paper forms traveling around campus
 - Invoices
 - Direct Pays
- ▶ Online historical records available in Concur
- ▶ Central location for outstanding invoices

Concur Sneak Peek

The screenshot displays the Concur user interface. At the top, a dark navigation bar contains the Concur logo and several tabs: 'Requests', 'Expense', 'Invoice' (highlighted with a red box and a red arrow), and 'App Center'. On the right side of this bar are links for 'Administration', 'Help', and 'Profile' with a user icon.

Below the navigation bar is a dashboard area. On the left, the Concur logo is displayed above the text 'Hello, Andrew'. To the right of the greeting are five summary cards: a '+ New' button, and four cards showing '00' for 'Authorization Requests', 'Purchase Requests', 'Available Expenses', and 'Open Reports'.

The main content area is titled 'COMPANY NOTES'. Under the sub-heading 'ANNOUNCEMENTS', there is a 'Welcome to Concur!' message. Below this, two paragraphs of text provide information about training: 'To sign up for Payment Card training please follow the link below: <https://emupcardtraining.eventbrite.com/>' and 'To sign up for a Concur Lab please follow the link below:'. A 'Read more' button is located at the bottom right of this section.

The 'MY TASKS' section features three task cards, each with a '00' indicator and a right-pointing arrow:

- Open Requests:** You currently have no active requests.
- Available Expenses:** You currently have no available expenses.
- Open Reports:** You currently have no open reports.

Next Steps



Questions?