

TRAVEL & EXPENSE – TIMELINE OF EXPENSE PROCEDURE CHANGES AND UPDATES

May 4, 2015

Through Operational Excellence for the Second Century (OE2C), the Procurement Initiative team has launched several initiatives to improve all aspects of the purchasing process for end-users, approvers and administrators. We are excited to announce that Concur—our new cloud-based, mobile-ready tool—will soon simplify all SMU pCard and business expense reimbursements, resulting in faster, easier processing. The transition to Concur is scheduled for June 20, 2015. As of that date, use of Concur will be mandatory.

To help facilitate an effective transition, we have been working with members of the SMU faculty, staff and administration to ensure that the overall cost of the purchasing process is decreased while simultaneously improving the ease of operation.

Why are we implementing this new expense procedure?

- **To replace** manual, paper-based process with automated Concur system featuring state-of-the-art functionality (e.g., ability to upload required receipts electronically).
- **To eliminate** layers of approvals and paperwork by using automated, electronic approval processes and once-per-month report filing requirements.
- To greatly **reduce reimbursement time** for non-travel (as well as travel) expenses through direct deposit.
- **To increase negotiating power** with vendors as all expenses are captured and recognized as SMU spending by **vendors**.

If you have an expense that is related to or occurs while traveling, that expense will be reported under *Travel* within Concur. Non-travel SMU Card and business expense reimbursement will be under *Expense* within Concur.

What's Next?

Prior to the upcoming launch date, we will announce a variety of training resources to best fit your needs and your schedule. These will include live training workshops, online quick guides, frequently asked questions and online training modules.

For additional information, please reference the following sources:

- For travel or entertainment questions (booking travel, pre-travel requests, processing travel expense reports etc.), go to travel.smu.edu, or contact Travel at travel@smu.edu.
- Access the full Travel and Entertainment Management Policy [here](#).
- Please submit questions via the [OE2C Comment/Question Form](#).

Thank you for your continued support of the OE2C initiative, which is strengthening the economic vitality of SMU, supporting our academic mission, and enhancing our stature as an outstanding academic institution.

