April 27, 2012

Dear P-Card Holders, Concur Approvers and Delegates:

Concur, the university’s automated travel and expense system, allows flexibility in creating and submitting expense reports. Multiple submissions, however, result in unnecessary expense to the university and an extra administrative burden on the expense approver.

The university-wide best practice is to submit one or two expense reports per month by following these steps:

- Create one expense report per month and add transactions to it throughout the month. Expense reports automatically save after you create the report header.

- Each expense line-level business purpose should be modified to describe why the expense is necessary to the university. The expense line business purpose field does not have to match the report header.

- Submit the report (once per month) at least five (5) business days before the end of the month to allow time for the approver(s) to review/approve the report and for an audit to be completed.

- Out-of-pocket business expenses can be submitted more frequently to ensure timely reimbursement to the employee. Whenever possible, combine these expenses into a single report.

Please begin following these guidelines immediately.

For assistance with Concur system navigation, including how to build an expense report over time, please contact the ITS Service Center at 4help@umich.edu or (734) 764-HELP (764-4357). If you have questions about these guidelines, please contact Carolynn Blankenship, accounts payable supervisor, at cblanken@umich.edu or (734) 763-4331.

Thank you for your support of this effort and for being good stewards of the university’s financial resources.

Nancy A. Hobbs
Director of Procurement Services