From: PCBO Subscription
To: pcbodist@coyote.csusm.edu
Subject: [Pcbodist] End-User Training for Concur Optimization - Go Live is March 9
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Attachments: ATT00001.txt



End-User Training for Concur Optimization - Go Live is March 9

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Sent on behalf of: Accounts Payable, Travel and Card Services

Hello PCBO Community,

As part of the CSU Expense Management Optimization project, end-user training will be offered to support travelers, cardholders, and delegates in becoming familiar with the enhanced Concur platform.

Training Schedule - Two sets of sessions will be available:

- **Chancellor's Office Sessions** - A comprehensive overview of platform enhancements, led by the team that developed the updates. Each of these sessions is a repeat and will cover all areas.
- **CSUSM Accounts Payable, Travel and Card Services Sessions -** Focused on CSUSM-specific processes, with the opportunity to ask department-level questions. Each session will go over one topic and will reoccur each week.

We strongly encourage you to attend both the Chancellor's Office and CSUSM sessions to gain a complete understanding of the updates.

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CHANCELLOR'S OFFICE - END USER TRAINING	
Request: • Card Services • Hospitality Justification Form • Local Mileage • Travel Allowance Update **Expense:** • New Report Types • Configuration Updates	Select the option that works best for you. These sessions are repeats: • Tue, Mar 3, 1:30p – 2:30p **Registration Link** • Thu, Mar 5, 11:00a – 12:00p **Registration Link** • Tue, Mar 10, 10:00a – 11:00a **Registration Link** • Wed, Mar 11, 10:00a – 11:00a **Registration Link**

CAL STATE SAN MARCOS - END USER TRAINING	
• Universal Card Request session - *follow along to order your new card that will replace ProCards and Travel Cards* • Hospitality Justification Form • Local Mileage Expense Report (NEW) • Travel (including auxiliary funded) • Direct Pay **Please Note:** A Universal Card Reconciliation training will be offered in late April once we get closer to the first close period.	• Mon, Mar 9, 2:30p -3:30p **(Card Order)** • Tue, Mar 10, 2:30p - 3:30p **(Hospitality)** • Wed, Mar 11, 2:30p -3:30p **(Local Mileage/Travel)** • Thu, Mar 12, 2:30p -3:30p **(Direct Pay)** • Mon, Mar 16, 10:00a – 11:00a **(Card Order REPEAT)** • Tue, Mar 17, 10:00a -11:00a **(Hospitality REPEAT)** • Wed, Mar 18, 10:00a -11:00a **(Local Mileage/Travel REPEAT)** • Thu, Mar 19, 10:00a -11:00a **(Direct Pay REPEAT)** • Mon, Mar 23, 9:00a -10:00a **(Card Order REPEAT)** • Tue, Mar 24, 9:00a -10:00a **(Hospitality REPEAT)** • Wed, Mar 25, 9:00a -10:00a **(Local Mileage/Travel REPEAT)** • Thu, Mar 26, 9:00a -10:00a **(Direct Pay REPEAT)** Use this link for all trainings: **https://csusm.zoom.us/j/87353362121**

Please reach out to **shonour@csusm.edu** with any questions!

Accounts Payable, Travel, and Card Services