

Agenda

Project Timeline

Travel and Expense Process

Changes

Workflow/Approvers

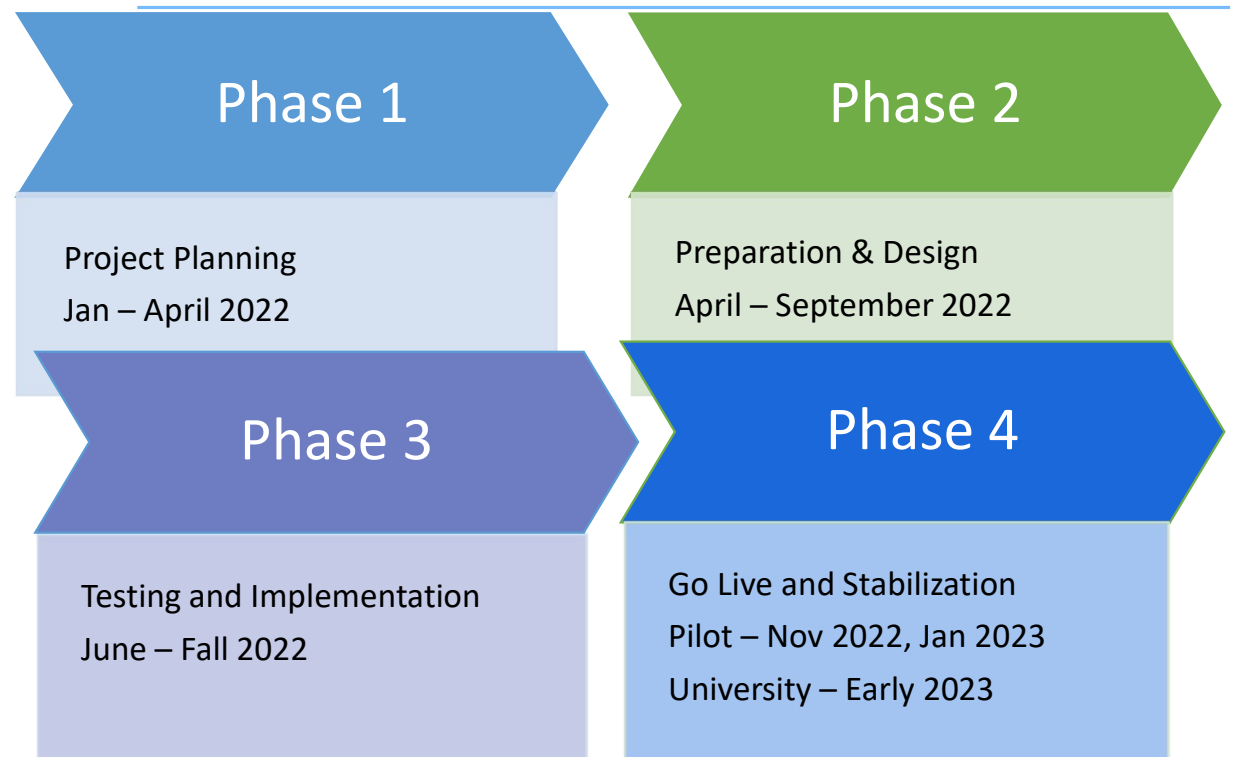
Training

Demo

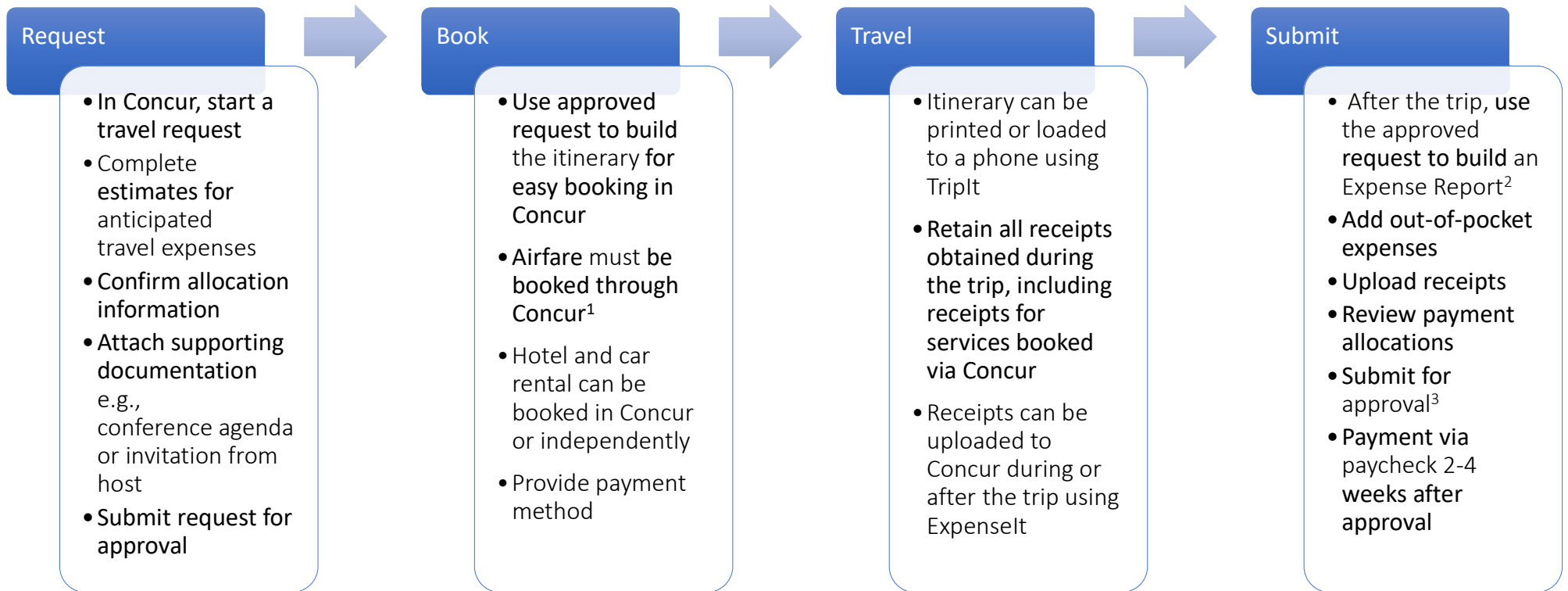
Questions

Four Phase Project Approach

Project Timeline



Travel and Expense Process



¹Advanced approval for an exception may be requested. Flights can be paid directly by UMB or by the traveler.

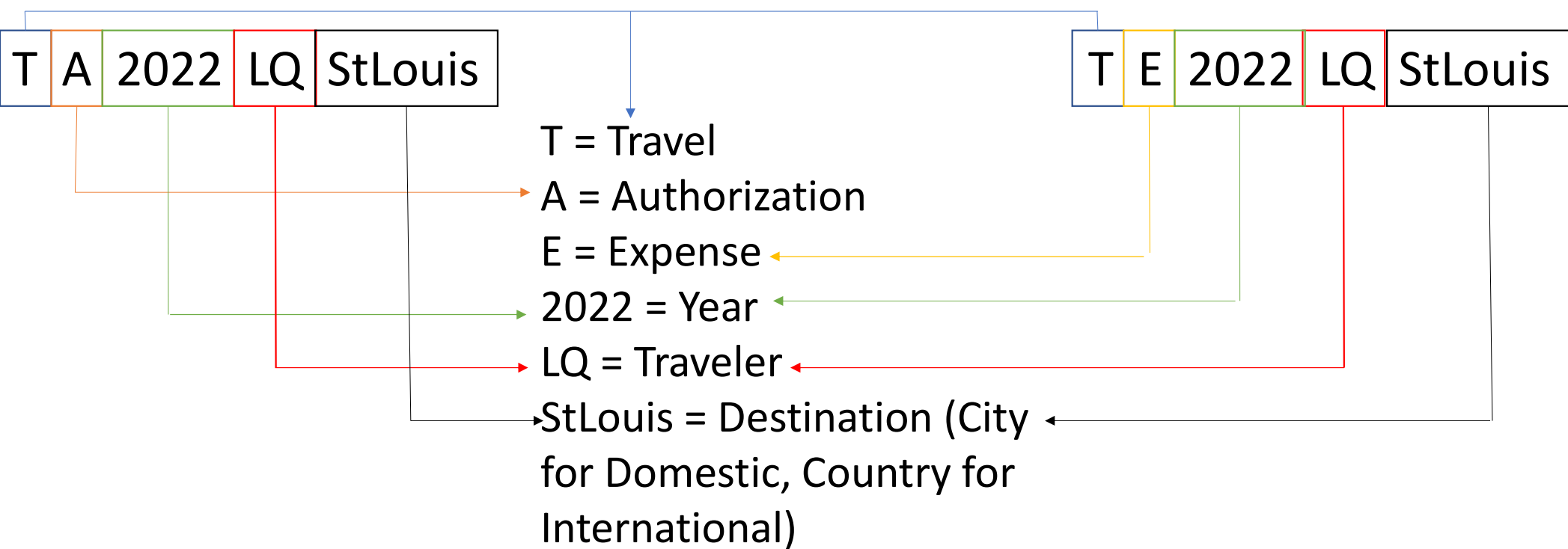
²If the reimbursement is not for a UMB employee, the payment is made using a NONPO Invoice.

³If an expense report is submitted 60 days after the last day of travel, the expenses become taxable. Expense reports not submitted within 6 months cannot be reimbursed.

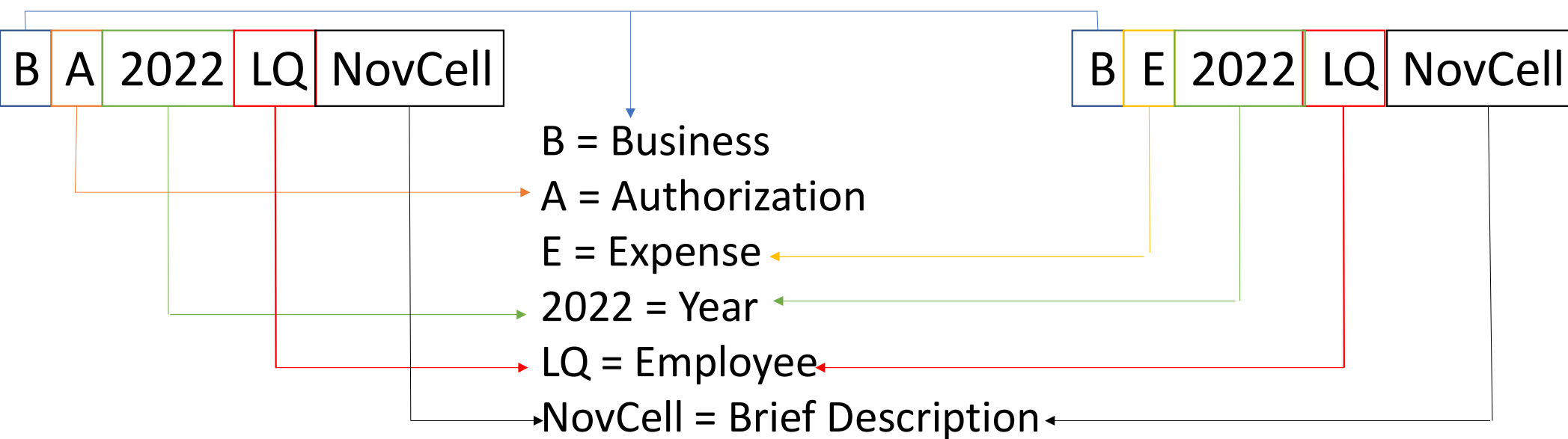
Travel and Expense Changes

- GSA Rate Used – Including Incidentals – No More Subtracting the \$5.00!
- Mileage Automatically Calculated – No More Maps!
- Create Request Form for Business Expenses in Concur
- Remove Central Office Approval for Expense Reimbursements Meeting Certain Criteria (low dollar, low risk types)
- Require Airfare to be Booked Through Concur
- Airfare Paid by Personal Credit Card Reimbursed after Trip

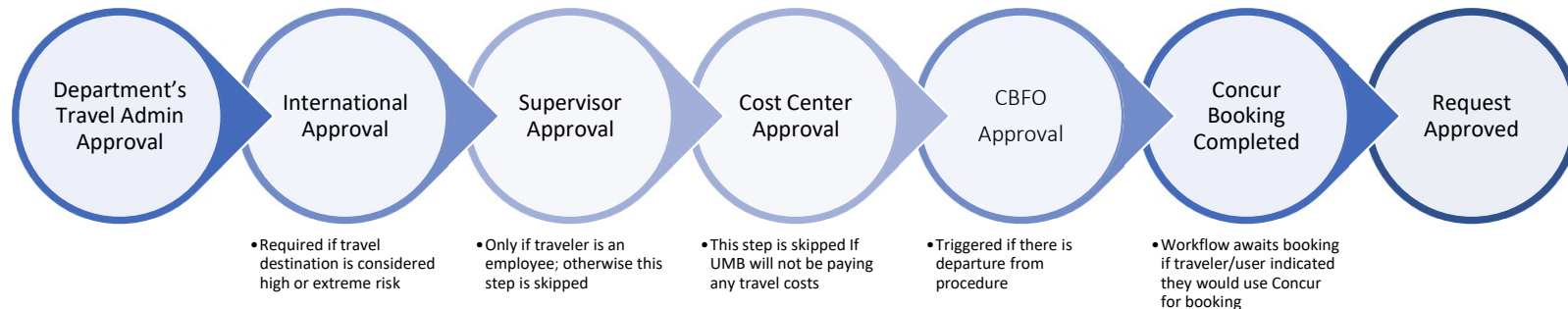
Travel Naming Conventions



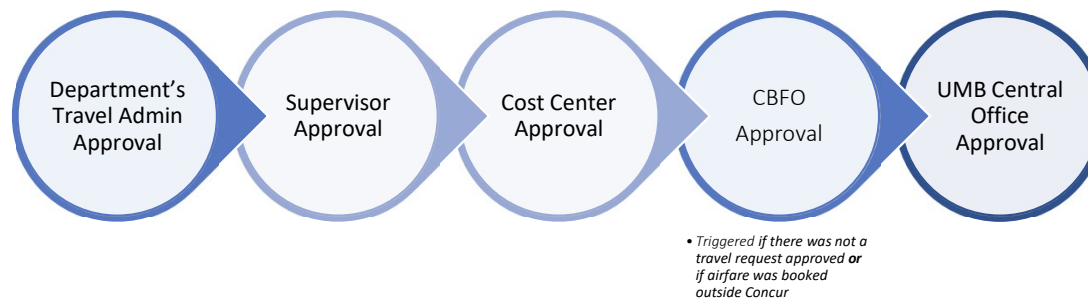
Business Expense Naming Conventions



Concur *Travel Request* Approval Workflow Upon Submitting



Concur *Travel Expense Reimbursement* Approval Workflow Upon Submitting – Employee Only



Approvers

- **Cost Center Approvers** will need to **request** security access
- **Supervisors** will be automatically **granted** access
- **Travel Administrators** will be **required** to go to training and then **request** security access

Approver	Level	Security Request
Cost Center	Org	Required
Supervisor	Employee	N/A
Travel Administrator	Employee	Required

[Security Request Form Link](#)

Training

Traveler Type	Intro To Concur (Self Study)	Travel Requests	Booking Travel	Expense Reports	Approving Travel	Business Expense Reimbursement (Self Study)
Travel Admin	✓	✓	✓	✓	✓	
Campus Traveler	✓	✓	✓	✓		✓
Supervisor	✓				✓	✓
Cost Center Approver	✓				✓	✓

Self Study
Instructor Led
✓ = Recommended

Intro to Concur and Business Expense Reimbursement courses are Self Study for All Users
 Travel Admin training is **required**

Training

- Travel Admins can begin registering December 7th
- Instructor led classes are for Travel Admins ONLY
 - Classes will begin January 17th, 2023 – February 24th, 2024
 - Multiple sessions of each class will be offered
 - You must register for Introduction to Concur Travel and Expense it is a prereq for ALL classes
 - This is a self study, user led class
- Look for an email from the Travel Training Lead – Laura Pogliano – with more details on registration

User aides and training materials are available [here](#)



Demo





Questions





Business Travel Policy and Procedure

December 7, 2022

Presenter:

Cindy Lyons, AVP and University Controller

Agenda

1. Policy
2. Procedure
3. Job Aids
4. Upcoming Events
5. Contact Information
6. Questions

Travel Website

Bookmark it!



UMB Policy VIII-11.00(A): Business Travel for Employees and Nonemployees

- Guiding principles for decision-making
- Authorizes procedures
- Revised policy is in progress
 - Added emphasis on safety and security
 - Includes the new Global Hub

Procedures on Business Travel for Employees and Nonemployees

- Describes rules on how to approve, book, and pay for travel expenses
- Two documents: Employee and Nonemployee
- Revised procedures are in progress

Procedure Changes - Highlights

- Concur enhancements
- [Quantum Financials](#)
- [Global Hub](#)
- Safety and security
- [Enterprise Risk Management](#)

Job Aids (under construction)



- Detailed one-page documents
 - Narrative
 - Visual
- Specific topics
 - Meals
 - Mileage
 - Etc

TRAVEL AGENCY – IMPORTANT UPDATE

- Please discontinue charging Globetrotter and Omega travel to UMB as of December 23, 2022
- To prepare for Concur, the Globetrotter and Omega accounts will be closed on January 1, 2023

Upcoming Events

- Travel Talks – December 14 at 10:00
 - Bi-weekly, one-hour discussions
 - Excellent opportunity to ask specific questions
 - Everyone is welcome
 - <https://umaryland.webex.com/umaryland/j.php?MTID=ma7f5771ea3e9cbf9a121de1f6130eb4d>

Upcoming Events

- Travel Professionals Group Quarterly Meeting
 - Early February
 - Policy and Procedure
 - International Operations
 - Enterprise Risk Management
- Travel Leaders Travel Agency: Campus Presentation
 - Date TBD

Contact Information

- For questions or concerns related to travel, please email the travel desk at travelhelp@umaryland.edu

Questions?





UNIVERSITY of MARYLAND
BALTIMORE

International Operations

Overview

December 2022



International Travel



Dan Fabbro

International Travel Specialist

- *Experience in international development and international security*
- *Lived, worked and traveled extensively in Europe and Southeast Asia*

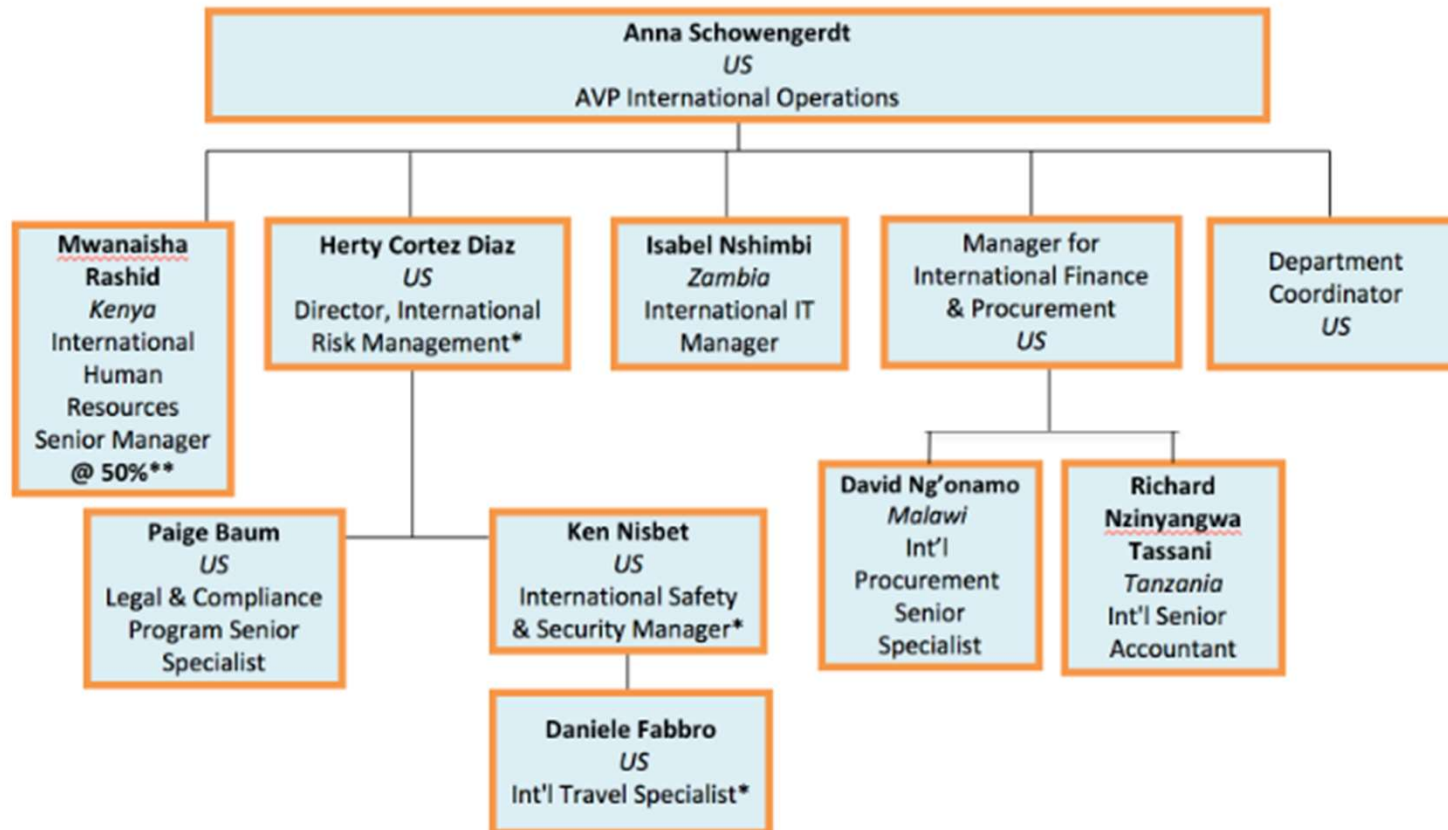
Watch the Global Hub Town Hall- available online at [UMB's YouTube page!](#)

International Operations & the Global Hub

- Ensure support of UMB's global activities
- Provide specialized support to UMB units in procurement, finance, human resources, compliance, International Travel, and Safety and Security
- Facilitates and promotes robust risk management across all international operations.

For more information: [Global Hub - Welcome to the Global Hub \(umaryland.edu\)](https://umaryland.edu/global-hub)

International Operations Team





International Travel and Security

- International challenges and travel security
- Empower personnel
- Safety and security as enabler of UMB
International Research and Programs

International Travel for Faculty, Staff, & Students

Global Hub: [International Travel \(umaryland.edu\)](https://umaryland.edu)

STEP 1: Take Personal Safety and Security Training

STEP 2: [Check destination country security ratings](#)

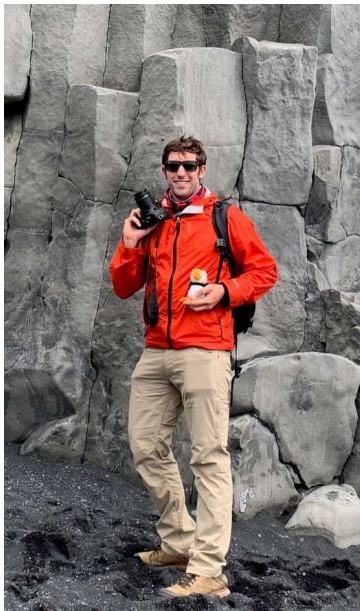
STEP 3: Sign International Traveler Attestation Form

STEP 4: Request Travel Authorization

STEP 5: Book your Travel with Travel Leaders

STEP 6: Download International SOS

International Safety and Security



Ken Nisbet

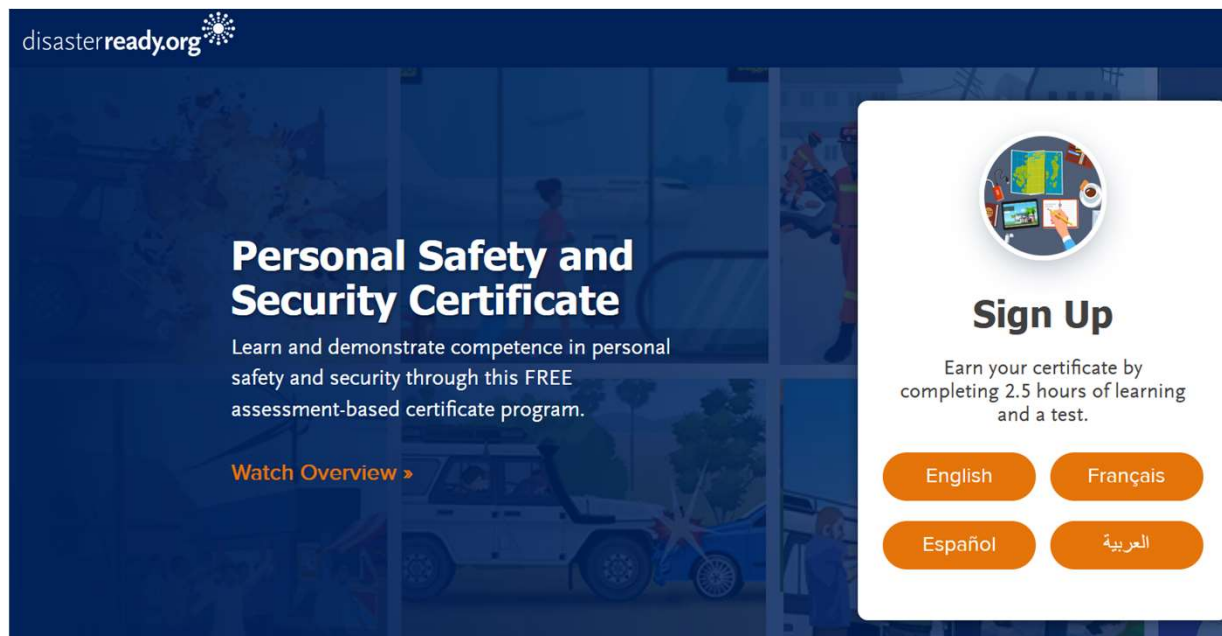
International Safety and Security Manager

- *12+ years experience in international security risk management*
- *Lived, worked and traveled extensively in Sub-Saharan Africa and the Middle East*

How International Operations supports you

Before You Go

- Learn at your own pace with recommended travel security courses via DisasterReady.org



The screenshot shows the DisasterReady.org website. The top left corner features the logo 'disasterready.org' with a sun icon. The main content area has a dark blue background with a grid of images showing people in various safety scenarios. The central text reads 'Personal Safety and Security Certificate' in large white font, followed by 'Learn and demonstrate competence in personal safety and security through this FREE assessment-based certificate program.' Below this is a 'Watch Overview >' link. On the right side, there is a white sign-up box with a circular icon containing a globe, a laptop, and a coffee cup. The box contains the text 'Sign Up' and 'Earn your certificate by completing 2.5 hours of learning and a test.' At the bottom of the box are four orange buttons for language selection: 'English', 'Français', 'Español', and 'العربية'.

disasterready.org

Personal Safety and Security Certificate

Learn and demonstrate competence in personal safety and security through this FREE assessment-based certificate program.

[Watch Overview >](#)

Sign Up

Earn your certificate by completing 2.5 hours of learning and a test.

English Français

Español العربية

How International Operations supports you

Before You Go

- Learn at your own pace with recommended travel security courses via [DisasterReady.org](https://www.DisasterReady.org)

Stages of Personal Safety and Security

Humanitarian organisations establish policies and procedures to mitigate risks to its staff. Their effectiveness is dependent upon how fully they are put into practice by individual staff members. Level of preparedness, awareness of potential risks, appropriate attitude, behaviour, and response greatly help in mitigating risks.

The six stages of personal safety and security are:

1. Awareness
2. Vigilance
3. Mitigation
4. Defuse
5. Escape
6. Defence

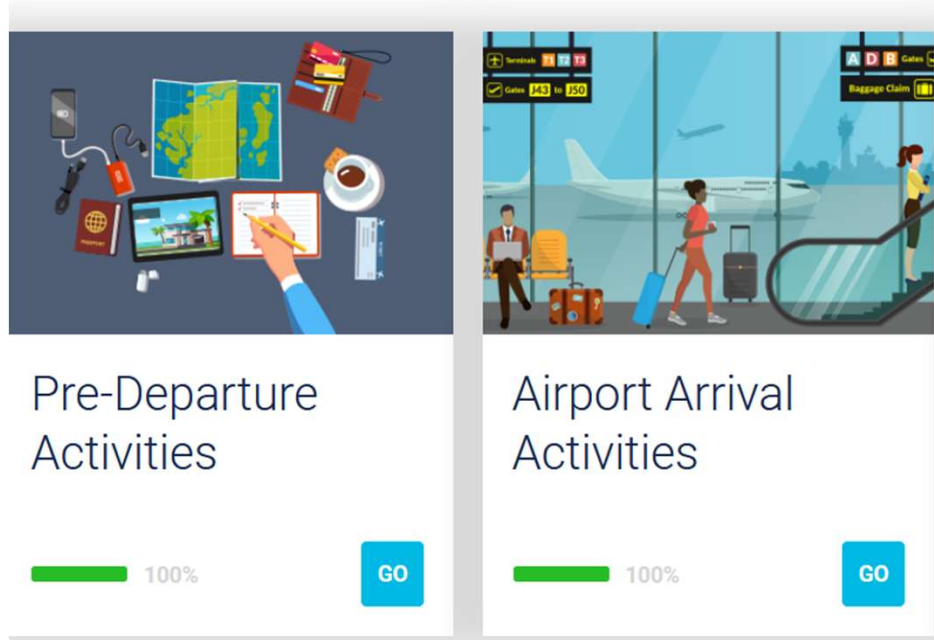


Personal safety and security awareness module

How International Operations supports you

Before You Go

- Learn at your own pace with recommended travel security courses via DisasterReady.org



The image shows two course cards from DisasterReady.org. The first card, 'Pre-Departure Activities', features an illustration of travel-related items like a map, a smartphone, a passport, and a coffee cup. The second card, 'Airport Arrival Activities', features an illustration of an airport terminal with people, luggage, and an airplane. Both cards show a 100% completion bar and a 'GO' button.










Activity	Progress	Action
Pre-Departure Activities	100%	GO
Airport Arrival Activities	100%	GO

Pre-travel considerations

How International Operations supports you

Before You Go

- Learn at your own pace with recommended travel security courses via [DisasterReady.org](https://www.DisasterReady.org)

		
Planning a Journey	Road Traffic Safety	Checkpoints
 100%	 100%	 100%
		

Vehicle travel and road safety

How International Operations supports you

Before You Go

- Learn at your own pace with recommended travel security courses via DisasterReady.org
- Pre-departure safety and security briefings/meetings



How International Operations supports you

Before You Go

- Learn at your own pace with recommended travel security courses via DisasterReady.org
- Pre-departure security briefings
- Always available to discuss safety and security considerations for your international trips and projects overseas

Want to talk to us?

Need to talk to someone about safety and security while traveling? Contact us at globalhub@umaryland.edu.

If you are having a medical emergency, [contact International SOS](#) .

For non-medical emergencies, [contact the International Safety & Security Incident Hotline](#) .

How International Operations supports you

During Your Trip

- International SOS:
 - Available to all traveling on UMB's behalf
 - Security and medical support, ranging from routine queries to evacuation
 - Sophisticated itinerary tracking system allows for IO to determine who is in the affected area of an incident
 - Additional information on International SOS and their mobile app can be found on the Global Hub
- UMB's 24/7 International Incident Reporting line
 - Connect with IO's Duty Officer for support and guidance as necessary

Any questions?

Reach out to us through:

- Global Hub Ticketing System
- Email: globalhub@umaryland.edu
- In-person or remote meetings