

Supporting University Travel

A Case Study: International Affairs

Challenge

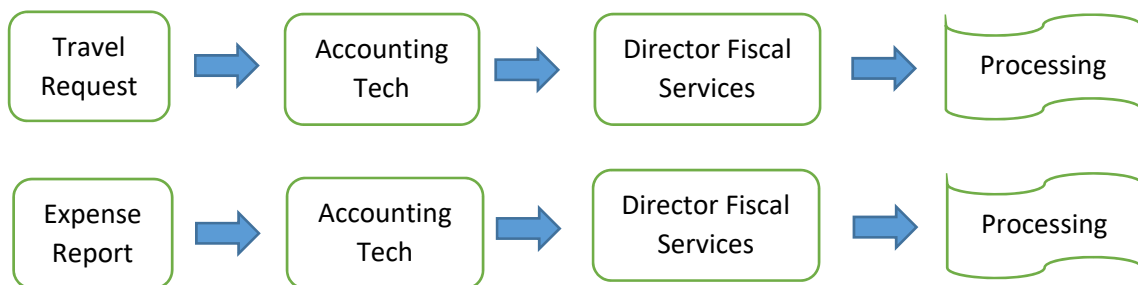
Transition 50 International Affairs employees and 43 faculty from schools and colleges leading Study Abroad programs to Concur.

Goals

1. Provide support and remove any stress associated with learning a new system.
2. Ensure International Affairs gets to review and approve travel on their Study Abroad indexes.

Solution

1. Sarah Jo was a Concur pcard user and participated in all BAO Concur training.
2. Sarah Jo established herself as a delegate in Concur for approximately 50 International Affairs staff and for another 43 faculty who work with Study Abroad.
 - a. Each Study Abroad program has a coordinator (International Affairs staff). There are seven coordinators that help facilitate 43 different faculty-led study abroad programs.
3. Sarah Jo conducted one on one Concur familiarization training with the seven study abroad coordinators in International Affairs so they were prepared to answer questions for the study abroad faculty.
4. Sarah Jo sent an all staff email offering one on one Concur training. Half of International Affairs staff took her up on it.
5. Sarah Jo took responsibility for creating travel requests for all Study Abroad travelers and instructed them to work with TMC for booking.
6. Sarah Jo loaded paper and email receipts for travelers, and showed them how to use the mobile app to load receipts in future.
7. Sarah Jo prepared Concur tips documents for; a) submitting request, b) uploading receipts, c) submitting expense report, and d) approve and forward, and shared them just in time for each specific task.
8. Sarah Jo and Katy created an approvals strategy for requests and expense reports within International Affairs:



Note: BAO created a special workflow that automatically routes any travel requests and expense reports on Study Abroad indexes to International Affairs for additional approval. Academic units are required then to add Katy Molloy Brady to the approval workflow when approving.

9. Sarah Jo sent email encouraging all study abroad travelers to enroll in the travel One Card program, then she enrolled for those who didn't on their own.
10. Sarah Jo supports users that want to track their expenses via Excel, or via the Concur tools
11. Sarah Jo and Pam handle all guest travel, mostly for recruiting.

Results

1. Tech savvy travelers are eager to control their own affairs, they load receipts and submit their own expense reports. Less tech savvy travelers require more assistance but are learning with each trip.
2. To keep program cost low for students, per diem is negotiated for each Study Abroad trip and the approved request amount reflects the trip budget. Sarah reviews and approves expense reports for technical accuracy, then Katy approves ensuring the accounting is accurate and allowed expenses are within budget.
3. International Affairs eliminated all but a couple travel cash advances by adopting One Card. One Card expenses automatically flow to the traveler's report indicating where receipts are needed.
4. Sarah Jo and Katy will learn to use and promote Tripit Pro because it may prove valuable for their international travelers.
5. Sarah Jo would like to enroll in the processor-training program specifically for internal staff. However all international travel is reviewed by the BAO Travel office regardless, which they appreciate.

Quotes:

"I love the Concur trip reports which help me reconcile professional development funds, and the audit trail is awesome for anticipating the timing of traveler reimbursement."

Katy Molloy Brady, Director of Fiscal Services International Affairs

"We instruct our travelers to work directly with the TMC since most of our travel is international and may include personal time. I prepare the request for 95% of our travelers. Some faculty are surprised when I offer to help them upload their receipts."

Sarah Jo Larson, Accounting and Contracts Technician International Affairs