

Supporting University Travel

A Case Study: School of Law

Challenge

Manage the transition from DuckWeb to Concur for travel administration.

Goals

1. Provide expert support as and when needed
2. Faster reimbursement processing
3. Clear communication
4. Efficient use of personnel resources

Solution

1. Right at the beginning, Erica Daley sent communications to the Law school faculty and staff with information about the new system and process, letting everyone know they could schedule time with Chris Hogansen for assistance.
2. Chris Hogansen Accountant 1 got into Concur immediately after BAO training and learned to use it. Chris was the first Concur expert and trainer in Law and held many in person sessions for folks who were not comfortable on their own.
3. Develop training materials and handouts.
4. Train thirteen superusers to provide support in each area of the school (admissions, Dean, faculty support, development, LRW, accounting, HR etc).
5. Announce that support is available from these superusers in each area.
6. Create an approvals strategy for requests and expense reports:



7. Sally Frisella who is one of the superusers, will handle a good portion of guest travel. However, other superusers in some areas will also handle guest travel. For example HR handles candidate travel.
8. Della and Erica Daley (Assoc Dean), promote and approve use of One Card and provide some training.

Results

1. Most staff (OA's, program assistants, and some tech savvy faculty are fairly self sufficient using Concur for request, booking and expense reports.
2. Not every faculty member needs a delegate.
3. Concur is just a different way for faculty to submit documents to us. System vs. paper. A few folks are unhappy but most are going about their business as usual.
4. Best way to train a traveler is to sit down with them, log in as delegate and show them the basics.
5. Della and some superusers may become processors to speed up employee reimbursements.
6. Did not find large forum employee training helpful. Too many people for effective Q&A.
7. Working through a few glitches with BAO.

Quotes:

“Chris Hogansen is an amazing self-starter, he engaged from the beginning, was generous with his knowledge, is a great trainer and participated regularly in BAO Travel drop-ins.”

Della Green Director of Finance School of Law