

Supporting University Travel

A Case Study: School of Music and Dance

Challenge

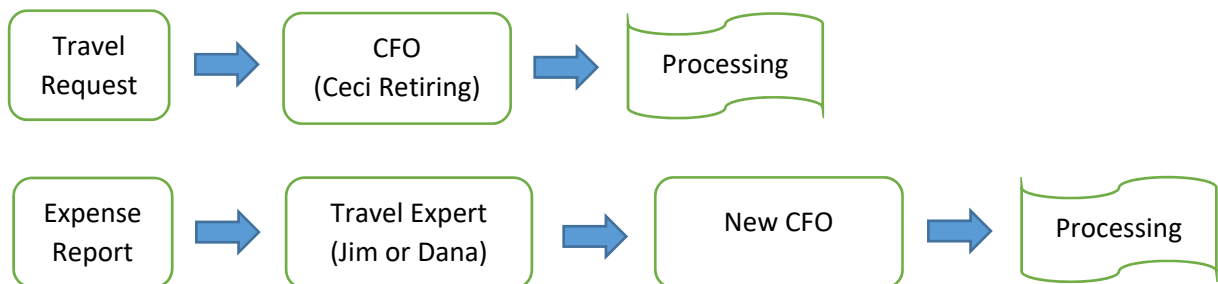
We originally thought faculty would be able to use Concur for travel booking and reimbursement without much assistance or training from the Dean's office and planned to take a step back. We realized however, faculty do require our support.

Goals

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

Solution

1. Assign responsibility for Concur support and the role of delegate to Accountant 1 (Jim Klenke) and OS2 (Dana Goreman).
2. Learn how to use Concur by getting hands on after initial BAO training.
3. Email announcement entire school assigning primary and back up travel delegates. Jim primary for Music and Dana primary for Dance. The Dean and Development Officer have personal assistants as primary delegate.
4. Provide hands on in person support and training.
5. Create an approvals strategy for requests and expense reports:



6. Strategy for handling guest travel is CFO prepares PSC's, Jim arranges travel for hiring candidates and Dana arranges travel for visiting artists.
7. Clearly communicate this travel strategy to employees in the School of Music and Dance.
8. Promote use of One Card, with CFO approval.

Results

1. Find that newer faculty are easily self-sufficient using Concur for booking, request and expense reports. More senior faculty are accustomed to and require more assistance with these tasks.
2. Find that the best way to train a traveler is to sit down with them, log in as delegate and show them the basics.
3. CFO currently reviews all travel requests for errors and omissions and suggests corrections. When new CFO hired plan to assign Jim and Dana as approver 1 for request instead of CFO.
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5. Once Jim or Dana have reviewed the expense report for accuracy and completeness, the CFO reviews it for accurate accounting.
6. Jim will train to be a travel processor. Once qualified Music expense reports will process immediately without requiring BAO Travel Office review and approval. Jim will meet regularly with other campus travel processors for professional development.
7. If folks are not confident using the online booking tool recommend calling the TMC instead.

Quotes:

“Newer faculty really want to arrange, request and expense travel on their own. More seasoned faculty tend to require more assistance.”

“I wish there was more of a hands on training similar to the training I went through with the old system eight plus years ago.”

Jim Klenke Accountant 1 Music