

SCTEM



SOCIETY FOR COLLEGIATE TRAVEL
& EXPENSE MANAGEMENT

iINNOVATION@SCTEM

Boise State University

Teri Gormley, Travel Services Supervisor





BOISE STATE UNIVERSITY

About Boise State University

- As Idaho's largest university and its fastest-growing research enterprise, Boise State recently joined a consortium of research universities including Purdue, Rice, Georgia Tech, University of Michigan and Texas A&M.
- Founded in 1932. Over 22,000 students supported by 2,700 faculty and staff.

Beyond the Blue Turf



BOISE STATE UNIVERSITY



While we may be most famous for our iconic Blue Turf, we have built a metropolitan research university of distinction in the Northwest, with our faculty and student researchers working to answer some of the most intriguing questions facing us today. Our campus is situated in the heart of Boise, Idaho, across the river from downtown, at the intersection of the region's centers of government, technology, business and the arts.

Where we travel,
Internationally:



BOISE STATE UNIVERSITY



BOISE STATE UNIVERSITY

- We don't have a managed travel program. Each college and department has their own set of procedures to approve travel.
- Travel purchases are generally centralized within each college.
- We have 2 expense auditors, 1 supervisor. We report to Accounts Payable.
- Typical university travel; research, conferences, collaboration, athletics
- Annual spend FY16:
 - air \$4.3 million
 - hotel 1.8 million
 - car rental 200 thousand
- We have no TMC
- We switched from Peoplesoft 8.8 to Oracle Financial Cloud on July 1st. Still working out the business processes.

Our travel program



BOISE STATE UNIVERSITY

Our
challenge:
Change
management
and
communication

- Policy was updated – needed to communicate change to a wide audience
- Many compliance issues were due to people “not knowing” policy
- Utilized Access database to determine frequency of common errors
- Updates to university website were slow, people had to navigate to the website to learn about changes
- Needed to blast email to only those who needed to know



BOISE STATE UNIVERSITY



- I created a Google site and a Google group after attending a training session on Google apps
- Ownership of the group is a drop-mail account established for Travel Services
- Using some PeopleSoft queries and an Access database, identified and invited frequent users of our expense system
- The team was happy to have the resource, communication could be consistent.
- Since there was no additional cost to the university, it was easy to sell the idea upstream.
- Using the group email, I sent an announcement to frequent users of our expenses system and invited them to sign up.

Our
solution

Google Group Welcome Screen



BOISE STATE UNIVERSITY

Groups

NEW TOPIC




Mark all as read

Actions

Filters

Boise State Travel And Expenses Shared privately

47 of 59 topics (1 unread) ★ 

Choose your group membership settings.

1. Go to [Google Groups](#).
2. Near the top left corner, click **My Groups**.
3. Find the name of the group > next to your name, click **Edit**.
4. Pick your settings using the "Setting options and how to choose them" section of this article.
5. In the lower left corner, click **Save**.

You can edit your Email subscription options

Choose how frequently you get email from the group: Click the drop-down menu on the line below your email address. You can choose any of the following options.

Don't send email updates: You won't get emails, but you can still see posts by logging in to Google Groups and clicking on that group.

Send daily summaries: On days when people post to the group, you'll only get one email that includes every message that was sent.

Send combined updates: You'll get one email for every 25 posts to the group.

Send me an email for every new message: You'll get an email anytime someone posts to the group.

Tip: If you post something and want to receive updates every time someone responds, check the box next to "Automatically subscribe me to email updates when I post to a topic."

[Edit welcome message](#) [Clear welcome message](#)

-  ★ OFC training
By me - 1 post - 2 views - updated Jul 20  
-  ★ Required documentation for Expense Reports in OFC
By Boise State Travel And Expenses - 1 post - 6 views - updated Jul 19 
-  ★ New system (OFC) and 2 steps everyone will have to do
By me - 1 post - 5 views - updated Jul 13 
-  ★ Training for the new system
By me - 3 posts - 10 views - updated Jul 6  

Sample
message




BOISE STATE UNIVERSITY

[boise-state-travel-and-expenses-group] Required documentation for Expense Reports in OFC

Inbox x



 **Boise State Travel And Expenses**
to Boise ▾

Jul 19 (8 days ago) ☆



Now that we have had some time to look over the expense report submissions, there are some things we need to remind you of. There are also some best practices we'd like to provide in hopes of easing some of the documentation pain points. These may change over time, as we learn the new system together.

Documentation that is required for expense reports:

- Pcard receipts for any expenses related to the trip
 - Lodging
 - Shuttle
 - Airfare
 - Registration
 - etc, etc.
- Approved TA
 - Number from Org Sync in "Purpose" field is sufficient
- Receipts for reimbursable items
 - Must indicate what was paid for and how it was paid
 - No receipts are required for **per diem** unless otherwise directed by your department.

Best Practice for ease of approval review/:

- Scan receipts in portrait orientation, all in the same direction
- Make sure receipts in scanned file are clear and legible.
- Remove blank pages from scanned file before attaching to report
- Scan receipts as no more than 2 or 3 files. (1 big file is okay, in the following order.)
 - File 1 - Reimbursable receipts in the order they are entered in the report
 - File 2 - Pcard receipts and/or TA approval
 - File 3 - Any department required documentation
- Name attachments something meaningful to your approvers -for example: LastName_Conference_year_receipts
- Attach everything at the "header", not the line

Check back often for revisions, we're all in this together!

1/1



BOISE STATE UNIVERSITY

- Solution was put in place in October 2013
- 412 members, 54 topics, lively discussions
 - Uber and AirBnB
 - Per diem vs. receipts for travel meals
 - Personal Travel combined with business travel
- Feedback: "Anita, I am going to piggy back on this e-mail. I too am very grateful and impressed with the professional and kind service we receive from Travel and Expenses. Also, I always find the updates very helpful. "
- Group discussions for business processes and changes to policy.
 - We learn from each other this way
- Fine tuning:
 - Some people like to reply all to group messages, which can be annoying. I switched to moderating all posts so we wouldn't get bombarded with comments that weren't relevant to the entire group.
 - Invitation message includes instructions to manage how often you receive email messages.

Our results



BOISE STATE UNIVERSITY

- If your school is using Gmail, this is a simple solution. Instructions for creating groups are available here:
<https://support.google.com/groups/?hl=en#topic=9216>
- In retrospect:
 - Start out moderating all posts, you can always allow certain users to post without filtering.
 - I started with a Google site, I would not do that again. It's too hard to maintain and nobody visits.
 - Don't be afraid to make a mistake
 - Don't be afraid to admit a mistake
 - Don't be afraid to correct a mistake
 - Be ready to correct your course
 - Turns out this is a great tool to determine where people are struggling. Used this to build better training, shared via Google Drive.

Tips for the
future