iNNOVATION@SCTEM

Boise State University

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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

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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:

Our travel program

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- 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 challenge:
Change management and communication

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- 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

Our solution

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- 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.

Google Group Welcome Screen

Sample message

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

Boise State Travel And Expenses   Jul 19 (8 days ago)
to Boise

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!

Our results

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- 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.

Tips for the future

B O I S E   S T A T E   U N I V E R S I T Y

- 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.