Faculty Travel Work Group
Update report received from Michael Kingery, 4-24-2017

Initial Faculty Travel Committee (FTC) Meeting – March 14, 2017
Present: Eric Kostelich, faculty – School of Math and Statistical Sciences (SMSS); Elly Van Gelderen, faculty – English; Beth Fiacco, staff - SMSS; Michael Kingery, Financial Services; Lori Beene, Financial Services

Unable to attend: Elisa Bienenstock, faculty – College of Public Service and Community Solutions; Penny Dolin, faculty – Polytechnic School GIT Programs (Engineering); Margo Cabrera, Financial Services

Concerns:
Faculty felt the system was rolled out without any training. Financial Service offered the following training options:
- o Schedule department-specific trainings at academic unit
- o Schedule one-on-one sessions with faculty member at their office or USB
- o Schedule "help desk" sessions at central locations where travelers can come with specific questions

Beth shared departmental information on their website accessible to faculty that helps outline departmental procedures step by step. Eric thought this would be helpful, and Beth forwarded the information to Financial Services. Financial Services will work on creating a template that can be distributed to departments to customize for their needs. Eric said faculty ultimately wants a system that merely indicates where they are going and the grant that is paying for it.

We discussed some difficulties within the system and determined that some of them are due to departmental constraints, not Financial Services rules. There seems to be very precise requirements for sponsored accounts, although they again vary by ORSPA employee and department. There may be some benefit to departments and ORSPA reviewing their travel documentation/process requirements.

Faculty expressed displeasure at not being able to upload text files (Concur requires images, PDF, JPG, etc.). Some professors may use LINUX operating systems, which can create additional complexity. Lori will review documentation to see if there is any guidance in documentation when using LINUX.

We talked about the ASU Travel Service Center providing full service travel request and expense report preparation. HIDA and English may be good areas to pilot with if we go that route.
The overall underlying issue appears to be missing/inconsistent communication. The My ASU Trip business card with all the relevant contact information was shared with all attendees. Elly was unaware that a central Travel Service Center was even available to provide support. It appears that information distributed to departmental administrators is not widely shared with faculty travelers

in some areas. Individual follow-up meetings with Elisa and Penny will be scheduled in the near future.

Follow-Up to Initial Faculty Travel Committee Meeting – April 19, 2017

Mike, Lori, and Margo from the Travel Service Center were able to meet individually with Penny and Elisa on April 12 and 13, respectively. As in the initial meeting with Eric, Elly, and Beth, both of these faculty members identified processing constraints that were attributable to departmental procedures rather than Concur or Financial Services restrictions. Both Penny and Elisa also mentioned that Concur is not intuitive and does not flow well. We agreed and explained Concur's design of the three separate modules and how Concur is working on streamlining the workflow. Concur has a new user interface due out this year which may resolve some of these issues, but we have not yet seen the new design nor been given an expected release date.

Penny and Elisa mentioned that the training materials on the website needed to be simplified as much as possible. It was suggested that creating an index of travel topics on the travel website would also help users find answers to their questions more quickly. We agreed and are pursuing a solution for the index and incorporation of all training materials.

Elisa also mentioned the issue with attaching receipts at the expense line for each cost rather than attaching all receipts at once. We explained that the current method makes it easier for approvers and auditors to review the trip expenses, but that we would discuss it again at the next Travel Advisory Group meeting. We also let her know that utilizing the Concur mobile app would streamline the receipt process and agreed with her that stronger promotion of the mobile app is warranted.

Another item discussed in all FTC meetings thus far was the lack of communication between faculty travelers and their respective departments. Faculty members within the FTC and across campus have noted that departmental staff were stretched too thin and they did not want to burden them with additional work. Others have said they did not want to ask their department or Travel Service Center for assistance out of embarrassment for not knowing the system. We assured them that when staff is available, it is their job to help them with travel – and if they cannot – the Travel Service Center is always a quick phone call or email away. Some colleges at ASU have designated a travel coordinator for each school and/or department as appropriate. This coordinator would be responsible for knowing the system and travel policy, and being the initial point of contact for asking any questions and providing department-specific training. We recommend that every school/department at ASU designate a travel coordinator and communicate the name/contact info to all faculty members in the college.

Over the summer, the Travel Service Center will work on the areas identified in our initial FTC meetings. We will provide an update to all FTC members when the fall 2017 semester is underway.