Agenda

• T&E Survey
• Process for establishing priorities
• Travel & Expense Roadmap
T&E Survey Results

535 Responses

- Academic Colleges: 49%
- Division of Finance & Administration: 12%
- Research Office including Centers & Institutes: 7%
- Extension & Experiment Stations: 11%
- Student Affairs: 8%
- Athletics: 2%
- Other: 11%
T&E Survey Results

How easy or difficult has it been to submit expense reports in Concur for your credit card?

- Easy, 14.58%
- Somewhat easy, 34.92%
- Somewhat difficult, 26.78%
- Difficult, 23.73%
T&E Survey Results

Challenges Raised – 142 total comments on expense reports

• Time consuming for staff to submit their own expenses.
• I am a faculty member, not an accountant, I shouldn't be spending my time on this
• Many challenges, I was not hired as an accountant, but I feel that I am expected to be now.
• Concur is not an easy system to navigate, and I don't use it often enough to get good at it.
• Simple things like there is not a place to add the agendas for meetings, so I did not add it in.
• So many seemingly routine tasks have been offloaded to faculty, and we're just no good at it.
• This is the most difficult, out of date, unwieldy system I have ever encountered.
T&E Survey Results

How satisfied or dissatisfied are you with the current travel booking options available to you?

- Concur Online Booking Tool: 28.47% Satisfied, 13.52% Somewhat satisfied, 9.96% Somewhat dissatisfied, 4.98% Dissatisfied
- CTP via Phone: 17.08% Satisfied, 5.34% Somewhat satisfied, 5.69% Somewhat dissatisfied, 3.38% Dissatisfied
- CTP via Email: 16.73% Satisfied, 7.47% Somewhat satisfied, 6.41% Somewhat dissatisfied, 6.41% Dissatisfied
- Third Party Booking: 4.63% Satisfied, 12.46% Somewhat satisfied, 16.01% Somewhat dissatisfied, 3.56% Dissatisfied
T&E Survey Results

How satisfied or dissatisfied are you with the current travel booking options available to you?

226 Comments Provided
T&E Survey Results

Please indicate the types of training resources you prefer.

- Live In-Person Training Sessions: 6.50%
- Live Virtual Training Sessions: 11.04%
- In Depth (20-30min) Recorded Videos: 8.19%
- Topic Based (5min) Recorded Videos: 21.19%
- Written Detailed User Guides: 20.04%
- One Page Quick Reference Guides: 33.04%
How do we prioritize?

Current Projects
System Configuration - 39
Training - 7
Policy - 3
Business Process – 19
Reports - 7

Initial factors used when determining project priorities
• Stakeholder Feedback
• Travel & Expense Team Feedback
• Leadership Strategic Planning
Travel & Expense Road Map

Travel & Expense Project Roadmap 2023

<table>
<thead>
<tr>
<th>Qtr 1</th>
<th>Qtr 2</th>
<th>Qtr 3</th>
<th>Qtr 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>Feb</td>
<td>Mar</td>
<td>Apr</td>
</tr>
</tbody>
</table>

**Training**
- Enhance T&E Training Program
- Revise Post Monitoring
- Banner JV Integration
- Update Audit Rules
- Business Purpose
- Onbase Document Integration
- CTP Smart Bill
- OSU Foundation Reimbursements
- International Travel Insurance
- Cardholders by Dept

**System Configuration**

**Business Process**

**Reports**

- Remove Request to Travel Integration
- Online Collections
- Just in Time Burst Reports

Published annually in January
Outlines planned priorities for upcoming year by Quarter
Broad visibility
Questions and What not?