Source2Pay Project

Process – Travel Request, Approval, Booking, & Modifications

Current State

Focus Group Meeting

July 2017
Agenda

- Welcome/Introductions
- Source-to-Pay Project Overview
- Project’s Process Details
- Process Current State
- Current State Identify Issues
- Next in the project’s process
- Questions
Welcome!

- Introductions
  - Name
  - Department
  - Current Job
  - Goal for being participating on a Focus Group
Source2Pay Project

Our current source-to-pay procedures at the University has significant opportunities for improvement and impact every department within the University system.
Project Purpose/Goal

- Identify process improvements throughout source to pay process
- Develop RFP
- Ultimate goal is to minimize, improve & standardize IT platforms
Project Process

Capture Current State

- Map process
- Current state document
- Present to Universities in focus group setting
- Present feedback to the team
- Finalize current state
- Present to Director Council
Project Process

Create Future State

- Map process
- Identify Issues
- Brainstorm recommendations
- Present to Universities in focus group setting
- Present feedback to the team
- Finalize proposed solutions
- Present to Director Council
Process – Travel Request, Approval, Booking & Modifications

Purpose of the process

The process ‘Travel Request, Approval, Booking & Modifications’ exist to:

‘Provide University faculty, staff, and students with the information needed to conform to travel policies when planning and conducting travel on behalf of the University of Illinois.’
Process – Travel Request, Approval, Booking & Modifications

Process Boundaries

**Begins:**

When the need for University travel is identified

**Ends:**

When the travel is booked and completed, and charges or modifications may occur throughout the trip
Process – Travel Request, Approval, Booking & Modifications

1. Identify need to travel
2. Complete request to travel
3. Receive approval
4. Make travel arrangements
5. Change/Modify request
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What do you do to process Travel Request, Approval, Booking, and Modifications
Issues with the current process?
Next Steps

- Present feedback to Project’s process Team
- Finalize current state
- Begin future state
- Present future state to each University
Contact Information

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Thank you!