Source2Pay Project

Process – Travel Request, Approval, Booking, and Modification

Future State

Focus Group Meeting

August 2017

Agenda

- Welcome/Introductions
- Current State Process Overview
- Current State Identified Issues
- Future State Recommendation
- Next in the project's process
- Questions

Welcome!

Introductions

- Name

- Department

- Current Job

- Goal for being participating on a Focus Group

Travel Request, Approval, Booking, & Modifications
Current State Overview

Identify need to travel

Complete request to travel

Receive approval

Make travel arrangements

Change/Modify request

Process –
Current State Identified Issues

- Each Focus Group mentioned the need for a University-wide travel process
- Corporate Travel Planners (CTP) liked by those that use it
  - Those not using it avoided it due to the extra fees involved
- Departments seem to be split on whether they have any formal process prior to travel
- Increasing pushback from carriers and hotels regarding the use of T-cards when the T-card holder is not present

Travel Request, Approval, Booking & Modifications
Future State Recommendations

Request a T-card for a frequent traveler in a University College/Department or recommend the traveler uses a department travel arranger.

Travel Request, Approval, Booking & Modifications
Future State Recommendations

Define "Best Practice" for University Travel when conducting travel on behalf of the University of Illinois

Travel Request, Approval, Booking & Modifications
Future State Recommendations

Create a travel training course available to people who travel on behalf of the University of Illinois.

Travel Request, Approval, Booking & Modifications
Future State Recommendations

Provide a travel guide of instructions to a traveler

Travel Request, Approval, Booking & Modifications
Future State Recommendations

We are recommending one system

Travel Request, Approval, Booking & Modifications

Future State Requirements

- Ability to provide a FAQ section and access throughout the system
- Ability to have a mobile application that has access to:
  - Create a travel plan
  - Book reservation
  - Tickets/Reservation
  - Ability to capture receipts
  - Ability to enter expenses
  - Ability to submit expense reports

Travel Request, Approval, Booking & Modifications
Future State Requirements

- Ability to have workflow to perform the following tasks:
  - Plan trip
    - Mode of travel
    - Lodging
    - Meals
    - Travel participants
  - Enter documentation e.g. business purpose
  - Receive pre-approval on travel
  - Book travel
  - Receive confirmations
  - Enter expenses
  - Upload documentations, e.g. receipts
  - Create expense report
  - Receive approval

Travel Request, Approval, Booking & Modifications

Future State Requirements

- Ability to add user defined data fields, e.g. to capture when travel credit is available, compliance such as export control, Visa status, Visa Dates

- Ability to identify all transactions related to a single unique travel event

- Ability to add business rules based on traveler

- Ability to identify type of traveler e.g. Student, Athlete, Faculty, Foreign National

Travel Request, Approval, Booking & Modifications
Future State Requirements

- Ability to enter personal information securely

- Ability to enter personal travel preferences

- Ability to enter travel credit vouchers and expiration dates

- Ability to link data when using similar data information from one data field to another data field.

Travel Request, Approval, Booking & Modifications
Future State Requirements

- Ability to define travel tracking reports

- Ability export data from application to be import into another application

- Ability to import data from another application

- Ability to link into other travel applications

Travel Request, Approval, Booking & Modifications
Future State Requirements

- Ability to link into the internet when researching travel plans

- Ability to integrate with payment processing systems

- Ability to proxy a travel arranger to a traveler

- Ability to generate multi expense reports to a single unique travel event

Travel Request, Approval, Booking & Modifications
Future State Requirements

- Ability for the system to alert travel planner when a travel event already exists for the same UIN and dates

Next Steps

- Present feedback to Project's process Team

- Finalize future state

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Thank you!