

# 22. Travel Request, Approval, Booking, & Modifications Process Report

September 2017



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## Overview

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The Travel Request, Approval, Booking, and Modifications process provides 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.

Illinois Mandate Symbol - 

University Policy Symbol - 

Professional Mandate Symbol - 

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## Process Executive Summary

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### Business Process

In this process, travel is defined as going to another location for the purpose of University business or bringing persons to the University for University activities. Types of travel are defined along with examples of travel expenses.

The process begins with a member of the University faculty, staff, student, or invited guest identifies a need to travel on behalf of the University of Illinois. A request for travel is created, which includes:

- Who is going
- What is the reason for travel
- When is the travel going to take place
- Why is the travel happening
- How would the travel be conducted
- The benefit to the University

Pre-approval is obtained after verification of funding. Travel arrangements are made either by the traveler or a travel arranger. Once arrangements are made, changes or modification can be requested prior to travel.

### Current Process Activities



### Approach

The current state process activities were mapped by the Subject Matter Expert (SME) and project process team. A SIPOC diagram was created to capture the tasks executed by the University System departments. The SME project team identified opportunities for improvement and brainstormed potential solutions. The current state was presented, issues were identified, and recommendations were discussed at customer focus group meetings in the University System. The process report was presented to the Source2Pay Director Council where they ranked the proposed recommendations for implementation.

### Key Findings

- Each University Focus Group mentioned the need for a University-wide travel process
- Corporate Travel Planners (CTP) are liked by the departments that use the service
  - Some units don't use the service to avoid the booking fees
- Departments are 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 isn't present

### Improvement Recommendations

The process team identified 18 suggested improvements. From the 18 suggested improvements, the team selected 5 improvements to recommend for implementation. The Director Council reviewed the 5 recommendations and ranked the proposed recommendations for implementation.

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Listed are the top four recommendations for implementation:

1. Request a T-Card for a frequent traveler in a University College/Department or recommend a traveler uses a department travel arranger
2. Provide a travel guide of instructions to a traveler
3. Define “Best Practice” for University Travel when conducting travel on behalf of the University of Illinois
4. Create a travel training course available to people who travel on behalf of the University of Illinois.

## Chapter 1: SIPOC Diagram

Process Name	Date
Travel Request, Approval, Bookings, & Modifications	August 2017

SUPPLIERS	INPUTS	PROCESS	OUTPUTS	CUSTOMERS
<b>Who</b> provides input to the process	<b>What</b> goes into the process	<b>How</b> the inputs are transformed to outputs	<b>What</b> comes out of the process	<b>Who</b> received the outputs of the process
Department Unit Principal Investigator (PI) Procurement Services Purchasing Traveler – External Traveler – University Vendors	Approvals Business purpose/justification Travel/Program Advance request CFOAPAL Expense estimates Quote Reservations Travel Award information Travel research Traveler’s information	Identify need to travel Complete request to travel Receive approval Make travel arrangements Change/Modify Request	Airline ticket number Approval documents Cash advance (ACH, check) Confirmed reservations Reimbursement Expense details Invoice Purchase Order	University Student University Faculty/Staff Non-University Guest <ul style="list-style-type: none"> <li>• Student/Athletic recruits</li> <li>• Donor</li> <li>• Employee candidates</li> <li>• External collaborator</li> <li>• Former University Students</li> <li>• Sponsor</li> </ul>



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## Chapter 2: Suppliers

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Suppliers provide input to the process:

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### Department Unit

What they care about: The traveler has the least difficulty as possible when planning and conducting travel, and the charges are applied to the appropriate accounts

When they care: Each time travel is requested

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### Principal Investigator (PI)

What they care about: Research is being supported

When they care: Each time they want to collaborate and share with the scientific community, and that their funding is used appropriately

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### Procurement Services

What they care about: University policies and procedures are followed.

When they care: Each time a Requisition for travel is submitted

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### Purchasing

What they care about: Travel Requisitions and Purchase Orders are processed correctly

When they care: Each time a request for a trip is submitted

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### Traveler - External

What they care about: Successful trip completion

When they care: Each time a trip is taken

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### Traveler – University (Faculty, Staff, Student)

What they care about: Successful trip booking and approvals are received

When they care: Each time a trip is taken

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### Vendors

What they care about: Getting University business, and receiving the correct information in the initial request

When they care: Each time their services are requested

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## **Business Rules**

University Policies and Procedures

OBFS Policies, Section 7, Section 8, Section 15, and Section 16 specifically the policies regarding the appropriate types of travel covered (economy versus business class)

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## Chapter 3: Inputs

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Inputs are information or verification which goes into the process

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### Approvals

Approvals provided by Departments, Principal Investigator, Supervisor, Purchasing, University Legal Counsel, received via the system (TEM), through email, or through a Department form

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### Business purpose/justification

A written description of the business purpose including; the benefit to the University, the reason for travel, and detailed descriptions that are acronym-free.

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### Travel/Program Advance request

There are two types of Advance Requests, Travel Advance and Program Advance. A Travel Advance is a request for cash prior to a trip to pay for trip expenses which cannot be paid for with either a P-Card or a T-Card. A Program Advance request is a request for cash for the work that is being done. A Program Request is not always requested during Travel.

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### CFOAPAL

Banner Account Code – Chart, Fund, Organization, Account, Program, Activity, Location

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### Expense estimates

The estimate of costs to be incurred during travel. It is recommended to over-estimate rather than underestimate an expense

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### Quote

A written amount of the estimated allowable expenses and amount Ex: Hotel, airline travel, car rentals

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### Reservations

Arrangements made for travel, lodging, and car rentals prior to travel

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### Travel Award information

The details of the Travel Award to which the travel expense will be applied. Information includes:

- Name of Award
- Parameters of award(documentation of allowable usages)

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- Amounts

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### Travel research

Documentation of the travel expenses prior to the reservations for the travel

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### Traveler's information

Traveler's information such as:

- Address
- Carrier Reward information (Frequent Flyer #s, Car rental programs, etc.)
- Cell phone
- Date of Birth
- Employee UIN
- Name as it appears on his/her Government ID

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### Business Rules

Recommend establishment of a profile within CTP for each traveler

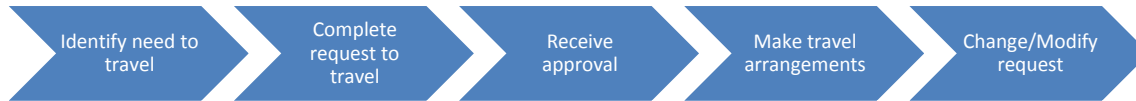
OBFS Website – Business Travel - <https://www.obfs.uillinois.edu/travel/>

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## Chapter 4: Process

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A process is defined as the method for transforming inputs into outputs:



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### Identify need to travel

A member of the University faculty, staff, or student identifies a need to travel on behalf of the University of Illinois.

Travel is defined as going to another location for the purpose of University business or bringing persons to the University for University activities.

Types of travel includes, but not limited to:

- Advancement (Donations)
- Athletics
- Collaboration on research with other Universities
- Education (continuing education, presenting)
- Guests of the University
- Legislation
- Outreach (Public education)
- Recruitment (Athletics, Education – faculty, students, and staff for employment)
- Study abroad programs
- University business

Examples of travel expenses includes:

- Modes of transportation: Airplane, automobile, bike, boat, bus, shuttle, taxi, train
- Lodging: Hotel, motel
- Meals: Business meetings, per diem
- Conference expenses: Meeting room expenses, lodging, meals,

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### Complete request to travel

A request to travel is created. This could be on a “Request to Travel” form, or the request could be contained in an email. The information will include the details of the travel, who is going, what is the reason for the travel, when is the travel, where is travel going to take place, why is the travel happening, and how the travel will be conducted. Also included is the benefit to the University.

Other tasks to be performed are:

- Assess workload of the department to account for the departure of a colleague
- Estimate expenses and check for the appropriate funds and budget

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- Review for any unused transportation credits tickets
- Review of Travel Award details
- Validation of the CFOAPAL
- Visa documentation for Foreign Nationals
- Obtain information regarding the details of the travel, (i.e. conference, lodging, travel dates/times)
- Verify any external compliance requirements such as Fly America, export control, travel to restricted countries, etc.

When group travel is being requested and a requisition is needed, create and submit the requisition.

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### Receive approval

The completed request for travel is routed for approval within the department. The person traveling cannot provide approval for their own travel authorization. There is a validation to confirm the funding prior to approval. If a grant fund is being used, appropriate approval is obtained by the Principal Investigator on the grant. If not previously completed, a verification of any external compliance requirements such as Fly America, export control, travel to restricted countries, etc. should be done.

If a requisition is used and approved, a purchase order is created, processed, and approved by the Purchasing department of the University

Approvals are provided within the documentation of the travel.

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### Make travel arrangements

Travel arrangements can be made by either the traveler or a travel arranger.

When a traveler or travel arranger plans the travel, the following is considered when making the payment:

- Lodging and transportation payment may be placed on a University T-Card
- Conference registration without lodging may be placed on either a University P-Card or a University T-Card
- Conference registration with lodging may be placed on a University T-Card

When a travel arranger needs to have a third party fax a credit card authorization form to a hotel, a secured fax is used.

When the travel plans are made by a travel arranger, confirmation is provided by the traveler.

If the traveler chooses to use their personal funding, after the completion of travel, the reimbursement request is submitted using the TEM application.

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### Change/Modify request

Changes and modifications can be requested prior to travel and also during the travel.

If changes occur prior to travel, the travel may be cancelled or rearranged. Travel may be rescheduled immediately, or cancellations are applied where applicable, resulting either in a refund or a held ticket for future use.

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If changes occur, may need to validate the CFOAPAL to ensure proper funding is still available. If not, contact appropriate approvers of the travel.

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### Business Rules

OBFS Policies-Section 7, Section 8, Section 15, Section 16

OBFS Website – Business Travel - <https://www.obfs.uillinois.edu/travel/>

University Policies

University System Policies

NCAA Rules and regulations

Illinois Higher Education Travel Control Board (IHETCB) (link to this from OBFS website)

Internal Revenue Service (business justifications)

Grant funding rules

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## Chapter 5: Outputs

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Outputs are the resulting information or entities that are produced as part of the process:

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### Record locator/Airline ticket

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### Approval documentation

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### Cash advance

Received from an approved Travel Advance request/Program Advance request. Payment is received either ACH or a check.

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### Reservation confirmations

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### Reimbursement

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### Expense detail

Examples would include, but not limited to:

- Travel receipts
- Proof of travel/attendance
- Details of business meals and participants (names and affiliation)
- details if lodging is shared

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### Invoice

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### Purchase Order

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## Business Rules

Grant funding rules

OBFS Website – Reimbursement Rates - <https://www.obfs.uillinois.edu/travel/reimbursement-rates/>

OBFS Website – Business Travel - <https://www.obfs.uillinois.edu/travel/>

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## Chapter 6: Customers

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Customers receive the output of the process.

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### University Student

What they want: Successful trip planning

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### University Faculty/Staff

What they want: Successful trip planning

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### Non-University Guest

- Student/Athletic recruits
- Donor
- Employee candidates
- External collaborators
- Foreign Nationals
- Former University Students
- Interviewees
- Sponsor

What they want: Successful trip planning

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### Business Rules

None

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## **Chapter 7: Customer - Oversight Roles**

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Customers who provide oversight and what oversight is needed: (Example Funders, OBFS, Auditors, Board of Trustees (BOT), Legislature, Public)

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### **Auditors-Internal and external**

What they want: Access to travel details for review

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### **Fair Labor Standards Act**

What they want: If personal travel is combined with business travel, the determination of where the boundary exists

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### **Illinois Higher Education Travel Control Board (IHETCB)**

What they want: Access to lodging exceptions that exceed the allowable amounts for domestic travel for review

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### **Internal Revenue Service (IRS)**

What they want: Adherence to Federal statutes

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### **International Student and Scholar Services (ISSS)**

What they want: Travel arrangements of affected students and scholars, prior to the travel

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### **National Collegiate Athletic Association (NCAA)**

What they want: Adherence to student athlete recruiting guidelines, and guidelines regarding transportation to events

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### **Uniform Guidance (UG)**

What they want: Oversight of travel attributed to a grant

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### **University Department**

What they want: compliance with the University and Department travel policies.

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### **Business Rules**

None

## 22. Travel Request, Approval, Booking, & Modifications

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## Chapter 8: Questionnaire for Current State Analysis

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**1. Why does the process exist?**

When University faculty, staff, student or invited guest has a need to travel for University business, they know what needs to be done to conform to travel policies, and provides consistency within the process.

**2. What is the purpose of the process?**

The purpose of the process is to obtain pre-authorization prior to travel, ensure that travel gets attributed to the correct CFOAPAL and budgeted funding, promote the use of contracted vendors, and ensure compliance with the State of Illinois, University Policies and OBFS policies, Federal governance with the IRS, compliance with Foreign National involvement, and Uniform Guidance with expenditures on certain grants and contracts.

**3. What are the process boundaries (i.e., when does it start and end?)**

When does the process start – When the need for University travel is identified

When does the process end – When the travel is booked and completed, and changes or modifications may occur throughout the trip

**4. What are the major activities/steps in the process?**

See [Chapter 4: Process](#) (Ctrl-click to follow link)

**5. What is the expected outcome or output of the process?**

See [Chapter 5: Outputs](#) (Ctrl-click to follow link)

**6. Who uses the output of the process, and why?**

See [Chapter 6: Customers](#) (Ctrl-click to follow link)

**7. Who benefits from the process, and how?**

The University faculty, staff, student, or invited guest benefits by being able to travel to an event on behalf of the University.

**8. What information is necessary for the process?**

See [Chapter 3: Inputs](#) (Ctrl-click to follow link)

**9. Where does that information come from?**

See [Chapter 2: Suppliers](#) (Ctrl-click to follow link)

**10. What effect does that information have on the process and output?**

The information going into the process creates the travel event.

**11. Who is primarily responsible for the process?**

The Traveler

The Travel arranger (This person may or may not be the same person as the traveler)

**12. What other units/organizations participate in or support the process?**

Other department units

Co-hosting organization(s), or business, or University

International Student and Scholar Services (ISSS)

University System technology support (ACCC for UIC), Technology Services for UIUC

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### 13. What Information Technology system(s) support the process?

- Banner
- Department shadow system
- EDW (Electronic Data Warehouse)
- Email
- F&S carpool (UIUC)
- iBuy
- Internet
- iTravel/Concur (provided by Corporate Travel Planners (CTP))
- MyUIFinancials
- TEM

### 14. What policies guide or constrain the process?

- Federal – IRS
- Federal Export Control
- Foreign National compliance
- Grants & Contracts
- NCAA/Big10
- State of Illinois
- Uniform Guidance (UG)
- University department's policy
- University Policy (UIUC, UIC, UIS)
- University System policy

### 15. How often does the process get executed?

Daily, depending on the department

### 16. What are potential defects with respect to the process?

- If not familiar with the process, identifying students and the benefit to the University
- Delays are costly if booking travel is held until the last minute
- Ambiguity between what is controlled with Policy/Rule between the University/Department/Grants & Contracts
- Personal preference that conflicts with University/State guidelines
- Not communicating adequately
- Not requiring supporting documentations for difference in cost allowed verses cost incurred
- Contract specifying the use of a specific vendor
- Person entering data gets feedback when arranging travel, when simply the middleperson
- Student travel
- Risk of exposing someone's personal information
- Appropriate levels of training and awareness of policies and procedures

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- Lack of ability to pre-plan travel and connect that plan to the reimbursement transactions
  - Lack of information for charter travel when non-contracted vendor is being used
- a. How often do the potential defects occur?**

Daily

### 17. What types of challenges have employees who participate in the process raised?

- Confusions as to which payment methods to use
- Many different ways to arrange travel (internet, iTravel, etc.)
- Struggles with use of T-Card simply for a reservation when the vendor/provider may require an alternate form of payment on-site
- Monitoring cash advances / tying them to travel / closing them out appropriately
- Lack of a means to track unused ticket credits/vouchers (airline, bus, train, etc.)
- Lack of awareness by travelers to request a voucher in order to use airline credits (i.e., they just don't show up to catch the flight; vs contacting the airline to request a voucher and pay the nominal cancellation fee)

### 18. What types of challenges or concerns have customers raised?

- Cheaper fares found outside of University-preferred vendors (iTravel)
- Difficulty in offering choices to those for whom travel is being arranged
- Lack of understanding on boundaries between personal and business travel
- Changes made to payment types within iTravel are not able to be changed after reservations are made.
- Other University requirements are needed to be verified when a non-contracted vendor is being used

### 19. Will the process be changed by another initiative in the near future

No changes are expected in the future.

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## Chapter 9: Questionnaire for Potential Process Improvement Candidates

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### 1. How would the process operate differently in the “Perfect Situation?”

- Perform all pre-approvals in a system
- Standardize and automate the process
- More easily monitor and prevent duplicate reimbursements
- Everything is approved prior to any arrangements being made
- Seamless process between the planned travel and conversion to the payments/reimbursements needed
- System with booking and expenses all in one
- Offer training prior to travel (Levels dependent on amount of travel expected)
- All travel is arranged and paid for through using a University T-card
- Online wizard that educates User on how to arrange travel
- Ability to more tightly monitor travel credits

### 2. What does the team hope to achieve through this improvement?

- Provide a streamlined, standard process for travel
- Cost-savings through volume discounts with card vendors, airlines, hotel chains, etc.
- Additional options for travel from Willard Airport (CMI) through documentation of amount of travel occurring outside CMS
- Buy-in from the top echelon of faculty and administration

### 3. Who would benefit from the desired improvement to the process?

Travelers and the University would benefit from the improvements.

Example would include:

- Persons that are receiving reimbursements faster
- Provide a streamlined, standard process for travel
- Cost-savings through volume discounts with card vendors, airlines, hotel chains, etc.
- Additional options for travel from Willard Airport (CMI) through documentation of amount of travel occurring outside CMI

#### a. How would we know?

- Fewer rejections
- Fewer complaints
- Reduced waiting time for reimbursements-happier customers
- Lower fees for booking through preferred vendors

### 4. What data can be provided with respect to the process performance (e.g. service rating, cycle time, customer survey responses, etc.)?

- UPAY has metrics
  - Time TEM spends waiting for reimbursement



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- Number of rejections for an average TEM
- Lower fees for bookings

### **5. Who should be included in any improvement discussions for the process?**

- Travelers
- College Deans and Department heads
- University support staff
- Travel arrangers

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## Chapter 10: Current State Metrics

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Metrics in three areas is being collected on each process. These metrics will be used to measure success in the future state.

How long does the process take from start to finish?

The process to make Travel arranges will vary depending on the type of travel, the mode of travel, and the number of travelers. The time may be as little as a few minutes, up to several months when foreign travel is required

How many touchpoints are there per process?

The touchpoints vary depending on the type of travel, the mode of travel, and the number of travelers.

How many steps are involved in each process?

There are as many as 69 steps could be involved depending on who is traveling, who is making the arrangements, and the detail of the travel.

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## Chapter 11: Feedback from Customer Focus Groups – Current State

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The Current State process was presented to each University's Customer Focus Group on July 25 – 27, 2017. A total of thirteen people attended with three people in attendance from UIC, two people from UIS, and eight people from UIUC.

### Campus Focus Group Summary

- 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

### Campus Focus Group Report

- Each Focus Group mentioned the need for a University-wide travel process
  - Respondents felt it would streamline and simplify travel for all involved
    - Anticipate pushback from travelers but still felt it would be beneficial in the long run
- Corporate Travel Planners (CTP) liked by those that use it
  - Many do not use it and book direct, in order to save the booking fees charged by CTP
  - Unaware of the extra benefits available through CTP when travel is interrupted
  - Most that do not use it allow the traveler to research their own travel, and then work with the T-Card holder for payment
  - Advantage to use them due to easier handling of credits if flights get cancelled or go unused.
- Departments seem to be split on whether they have any formal pre-approval process prior to travel
  - Those that do have a formal approval process prior to travel taking place do so with an intradepartmental form that they created.
    - A few use the built-in functionality in TEM that allows for travel pre-approvals
  - Travel for conferences is a travel type that most seem to pre-approve
    - Larger expense due to conference costs
    - Also need to ensure the funding is appropriate for conferences
  - Many were interested in hearing from other departments as to how they handle pre-approvals
    - Realization that they would get pushback from travelers, but it would help reduce overspending

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- Many struggle with determinations of division between personal and professional travel, when the two are combined
  - Some limit the expenses to what is budgeted, and any overages are the traveler's responsibility
- International travel has its own unique issues
  - Credit card issues are not uncommon with international travel
- Increasing pushback from carriers and hotels regarding the use of T-cards when the T-card holder is not present
  - Some hotels require the T-card to be presented at check-in
    - Hotel then refuses to bill the T-card, but instead bills the traveler's personal cards, so the travelers then have to submit for reimbursement
- Some are getting exemptions from Hotel/motel taxes due to being a State agency, and with reciprocity to other states within a consortia to which the State belongs

## Chapter 12: Opportunities for Improvements

The following opportunities for improvement were identified through team discussions, University customer focus group meetings, and the Director Council. Issues were categorized into seven categories, covering Communications, Documentation, Policy and Procedures, Resources, Technology, Training, and Other. Issues shown in **Bold** are connected to a Recommendation for Improvement in [Chapter 15: Recommendations for Improvements](#)

Communications – Issues related to providing information	
<b>C1</b>	<b>Not familiar with the process to identify students who are traveling and what the benefit is to the University</b>
<b>C2</b>	<b>Delays are costly if booking travel is held until the last minute</b>
<b>C3</b>	<b>Not communicating adequately</b>
<b>C4</b>	Contract specifying the use of a specific vendor
<b>C5</b>	Appropriate levels of training and awareness of policies and procedures
<b>C6</b>	<b>Lack of information for charter travel when non-contracted vendor is being used</b>
<b>C7</b>	<b>Many different ways to arrange travel (internet, iTravel, etc.)</b>
<b>C8</b>	<b>Monitoring cash advances / tying them to travel / closing them out appropriately</b>
<b>C9</b>	<b>Lack of awareness by travelers to request a voucher in order to use airline credits (i.e., they just don't show up to catch the flight; vs contacting the airline to request a voucher and pay the nominal cancellation fee)</b>
<b>C10</b>	Cheaper fares found outside of University-preferred vendors (iTravel)
<b>C11</b>	<b>Lack of understanding on boundaries between personal and business travel</b>
<b>C12</b>	Who owns the travel process?
<b>C13</b>	<b>Inconsistency within the processes that are enforced by the different units</b>
<b>C14</b>	<b>Corporate Travel Planners (CTP) many do not use it and book direct, in order to save the booking fees charged by CTP</b>
<b>C15</b>	<b>Corporate Travel Planners (CTP) unaware of the extra benefits available through CTP when travel is interrupted</b>

Documentation – Issues related to lack of documentation	
<b>D1</b>	<b>Not familiar with the process to identify students who are traveling and what the benefit is to the University</b>
<b>D2</b>	<b>Not always providing supporting documentations for difference in cost allowed versus cost incurred</b>
<b>D3</b>	Contract specifying the use of a specific vendor
<b>D4</b>	Risk of exposing someone's personal information
<b>D5</b>	Monitoring cash advances / tying them to travel / closing them out appropriately

## 22. Travel Request, Approval, Booking, & Modifications

Documentation – Issues related to lack of documentation	
<b>D6</b>	Compliance due to the units combining the approval process of approving time away from the job along with the approvals for travel
<b>D7</b>	No being familiar with compatibility of visa status and dates with travel plans

Policy/Procedures – Issues related to Procurement Policies and Procedures	
<b>P1</b>	<b>Not familiar with the process to identify students who are traveling and what the benefit is to the University</b>
<b>P2</b>	<b>Ambiguity between what is controlled with Policy/Rule between the University/Department/Grants &amp; Contracts</b>
<b>P3</b>	<b>Personal preference that conflicts with University/State guidelines</b>
<b>P4</b>	Many different ways to arrange travel (internet, iTravel, etc.)
<b>P5</b>	<b>Difficulty in offering choices to those for whom travel is being arranged</b>
<b>P6</b>	<b>Lack of understanding on boundaries between personal and business travel</b>
<b>P7</b>	Who owns the travel process?
<b>P8</b>	<b>Inconsistency within the processes that are enforced by the different units</b>
<b>P9</b>	<b>Compliance due to the units combining the approval process of approving time away from the job along with the approvals for travel</b>
<b>P10</b>	<b>Knowing with a foreign national travel is permissible, and can be reimbursed</b>
<b>P11</b>	Lack of timeliness requirement for pre-approval, authorization of travel
<b>P12</b>	Lack of reinforcement of ability or responsibility to say "No" at the unit level
<b>P13</b>	<b>Not all frequent travelers have a T-Card</b>

Resources (Financial, Human) – Issues related to lack of sufficient staff or funding	
<b>D1</b>	Difficulty in offering choices to those for whom travel is being arranged
<b>D2</b>	Corporate Travel Planners (CTP) many do not use it and book direct, in order to save the booking fees charged by CTP
<b>D3</b>	Corporate Travel Planners (CTP) unaware of the extra benefits available through CTP when travel is interrupted
<b>D4</b>	Some are getting exemptions from Hotel/motel taxes due to being a State agency, and with reciprocity to other states within a consortia to which the State belongs

Technology – Issues related to system’s lack of functionality to support the process	
<b>T1</b>	Person entering data gets feedback when arranging travel, when simply the middle person
<b>T2</b>	<b>Risk of exposing someone’s personal information</b>
<b>T3</b>	<b>Lack of ability to pre-plan travel and connect that plan to the reimbursement transactions</b>

## 22. Travel Request, Approval, Booking, & Modifications

Technology – Issues related to system’s lack of functionality to support the process	
<b>T4</b>	<b>Lack of information for charter travel when non-contracted vendor is being used</b>
<b>T5</b>	<b>Many different ways to arrange travel (internet, iTravel, etc.)</b>
<b>T6</b>	<b>Monitoring cash advances / tying them to travel / closing them out appropriately</b>
<b>T7</b>	<b>Lack of a means to track unused ticket credits/vouchers (airline, bus, train, etc.)</b>
<b>T8</b>	Cheaper fares found outside of University-preferred vendors (iTravel)
<b>T9</b>	<b>Changes made to payment types within iTravel are not able to be changed after reservations are made.</b>

Training – Issues related to lack of understanding the process	
<b>TR1</b>	<b>Not familiar with the process to identify students who are traveling and what the benefit is to the University</b>
<b>TR2</b>	<b>Delays are costly if booking travel is held until the last minute</b>
<b>TR3</b>	<b>Ambiguity between what is controlled with Policy/Rule between the University/Department/Grants &amp; Contracts</b>
<b>TR4</b>	Personal preference that conflicts with University/State guidelines
<b>TR5</b>	Contract specifying the use of a specific vendor
<b>TR6</b>	<b>Appropriate levels of training and awareness of policies and procedures</b>
<b>TR7</b>	<b>Confusions as to which payment methods to use</b>
<b>TR8</b>	Many different ways to arrange travel (internet, iTravel, etc.)
<b>TR9</b>	<b>Lack of awareness by travelers to request a voucher in order to use airline credits (i.e., they just don’t show up to catch the flight; vs contacting the airline to request a voucher and pay the nominal cancellation fee)</b>
<b>TR10</b>	Cheaper fares found outside of University-preferred vendors (iTravel)
<b>TR11</b>	<b>Lack of understanding on boundaries between personal and business travel</b>
<b>TR12</b>	<b>Corporate Travel Planners (CTP) many do not use it and book direct, in order to save the booking fees charged by CTP</b>
<b>TR13</b>	<b>Corporate Travel Planners (CTP) unaware of the extra benefits available through CTP when travel is interrupted</b>
<b>TR14</b>	<b>Knowing with a foreign national travel is permissible, and can be reimbursed</b>

Other – Issues related to process is outside of the Purchasing and Procurement Services	
<b>O1</b>	<b>Struggles with use of T-Card simply for a reservation when the vendor/provider may require an alternate form of payment on-site</b>
<b>O2</b>	Who owns the travel process?
<b>O3</b>	Credit card issues are not uncommon with international travel

## 22. Travel Request, Approval, Booking, & Modifications

### Other – Issues related to process is outside of the Purchasing and Procurement Services

<b>O4</b>	Some are getting exemptions from Hotel/motel taxes due to being a State agency, and with reciprocity to other states within a consortia to which the State belongs
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## Chapter 13: Suggested Improvements

The following recommendations came from discussions with the process team members, and/or the Director Council, and/or University System focus groups. Not all improvements were selected by the process team. The selected improvements were presented to the University focus groups for feedback, and are recommended from review by the Director Council. A Suggested Improvement displayed in **bold** is associated with a Recommendation for Improvement, and is further discussed in [Chapter 15: Recommendations for Improvements](#)

Number	Category	Suggested Improvement
1	Communications	Traveler and Traveler Arranger should subscribe to travel announcements in OBFS News Center
2	Communications	Travel Tips email to traveler when travel is approved before booking
3	Documentation	<b>When traveler files travel plan and it's approved, they received brief, one-sheet with relevant travel guidelines</b>
4	Documentation	Cross-check UIN with registrar's registered student roaster. If student trigger request for benefit to University or to the grant
5	Policy & Procedures	<b>Issue T-Card to frequent travelers</b>
6	Policy & Procedures	Allow traveler to select best pricing through iTravel
7	Policy & Procedures	Implement a consequence for repeated violation (e.g. no T-Card arrange travel, etc.)
8	Policy & Procedures	Centralize Travel
9	Resources	University needs to add qualified personnel and pay cumulatively
10	Technology	<b>One system for booking travel and reimbursement travel, implement one standard travel method, Centralized System (mandate) for requesting, authorizing, and documenting travel and travel plans</b>
11	Technology	Connect travel to expense report in TEM
12	Technology	Require students and employees to file travel plan in TEM prior to travel, (No Shadow Systems)
13	Technology	More specific details about using charter services (Insurance requirements, purchasing contact information)
14	Training	<b>Mandatory Pre-Travel training for all travelers</b>
15	Training	<b>Best practices training for travel arrangers, implement standard training program</b>
16	Training	CPT Benefit fact sheet that can be given to new employees
17	Training	Offer a travel orientation program for new employees and provide related refresher training
18	Training	Host occasional/regular working sessions with UPay and users to work through Challenges

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## Chapter 14: Feedback from Customer Focus Groups – Future State

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The Future State process was presented to each University's Customer Focus Group on Tuesday, August 29, 2017 – Thursday, August 31, 2017. A total of ten people attended with three people in attendance from UIC, one person from UIS, and six people from UIUC.

### Campus Focus Group Summary

- Mixed response on issuing a T-Card to frequent travelers within a department who travel on behalf of the University of Illinois
- Responses were mixed on a Best Practice for University Travel. Some attendees felt this responsibility is higher within each University to recommend. Some departments felt the department already has a Best Practice they were following. Some liked the idea as a list of “Dos and Don'ts”
- Response for having a Travel training course was not received well. Felt the faculty would not attend
- Attendees were very receptive of providing a travel guide of instructions, and liked the idea University Payables would create the template to include the policies and procedures with the ability for departments to include their policies and procedures

### Campus Focus Group Report

- T-Card frequent traveler
  - Department reduced the number of T-cards issues due to department policy
  - Feel the less amount of people who have T-cards the better, it's a lot of responsibility
  - This will only work if they (faculty and staff) know the rules and follow the rules or take the card away
  - Can't use T-cards for car rentals unless the person driving is the person renting the car
  - Former department issued over 100 T-cards the process worked, if the person didn't follow the rules, the T-card was taken away
  - Housing department, most everyone has a T-Card
  - In some departments where a T-Card is issued and the rules aren't followed, asked to reimburse for the spending
- Best Practice
  - Doesn't feel this would work with faculty
  - Some departments already have a policy
  - How would you enforce? This is a Best Practice, guidelines

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- Create a Training Program
  - Faculty would not attend
  - This should come from a higher level from the University, not procurement services
  - A class is not necessary, and outline is
  - Would prefer a 5 minute video
  
- Travel Guide of Instructions
  - This is a good idea!
  - Like this idea better than a course
  - Have the basics provided by procurement services and then the departments can customize base on their own policies

## Chapter 15: Recommendations for Improvements

The recommendations have been identified for improvement. Four different categories were identified for the improvements, and each improvement received a level of implementation. The categories include Documentation, Policy and Procedures, Technology, and Training. There are two levels of implementation: “short-term” indicates improvements suggested for the current system and process prior to the development of an RFP, and “long-term” indicates improvement to the process with an RFP for a new system. The recommendations are in order to make the process better, help the users understand the process, and make sure the process works.

Number	Describe Potential Solutions	Category	Implementation Level	Related Issue(s)
1	<p><b>Request a T-card for a frequent traveler in a University College/Department or recommend the traveler uses a department travel arranger.</b></p> <p>We are recommending University Colleges/Departments review the frequency of travel for each faculty member and staff personnel and consider requesting a T-Card for the frequent traveler. The determination of “frequency” would be completed by each University department.</p> <p>If the University College/Department prefers not to issue a T-Card directly to a traveler, recommend using a department travel arranger who has access to a T-Card.</p> <p>We recommend the following:</p> <ul style="list-style-type: none"> <li>• Creating a message informing University faculty and department business managers of the benefits for allowing a frequent traveler to be issued a University T-Card.</li> <li>• Go to each University’s business managers’ meeting to discuss the benefits of a frequent traveler having a University T-card.</li> </ul> <p>By having frequent travelers issued a University T-card would result in the following benefits:</p> <ul style="list-style-type: none"> <li>• Reduction in the amount of personal expense reimbursements</li> <li>• Reduction in issues regarding pushback from Hotels/rental car agencies due to the person traveling not matching the name of the person that reserved using a T-card.</li> </ul>	Policy & Procedure	Short term	D4, P13, T2, T9, TR6, TR7, O1

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Number	Describe Potential Solutions	Category	Implementation Level	Related Issue(s)
2	<p><b>Define “Best Practice” for University Travel when conducting travel on behalf of the University of Illinois</b></p> <p>We are recommending a working group be formed with representation from each University to define “Best Practice” for University Travel. This will provide University faculty and staff with the policies and procedures to make travel arrangements and follow when conducting travel on behalf of the University of Illinois.</p> <p>The working group will have representation from each University who make travel arrangements, people who travel, and University Payables.</p> <p>Within defining the “Best Practice” for University Travel will include:</p> <ul style="list-style-type: none"> <li>• The boundaries between business vs personal travel</li> <li>• Approval process, including pre-travel approval</li> <li>• Valid methods of travel payments</li> <li>• University process to book travel arrangements for lodging, travel mode, and expenses</li> </ul> <p>“Best Practice” for University Travel will be defined for a traveler and a travel arranger.</p> <p>The benefit of a “Best Practice” for University Travel will be to provide the knowledge of policy prior to the traveler making travel arrangements and conducting travel.</p>	Training	Short Term	C1, C2, C3, C5, C6, C9, C11, C13, C14, C15, D1, D2, D6, P1, P2, P3, P6, P8, P9, D2, D3, TR1, TR4, TR6, TR7, TR9, TR11, TR12, TR13
3	<p><b>Create a travel training course available to people who travel on behalf of the University of Illinois.</b></p> <p>We are recommending creating a training course available to all University faculty, staff, and students who travel on behalf of the University of Illinois. This will allow the traveler to become familiar with the “Best Practice” for University Travel the University has defined and supports to be followed.</p> <p>Upon completion of the “Best Practice” for University Travel, create a training course and make available to all University faculty, staff, and students who travel. The training course will consist of:</p> <ul style="list-style-type: none"> <li>• The defined ‘Best Practice” for travel</li> <li>• Policies and Procedures</li> <li>• The location where to find the Policies and Procedures when needing to reference</li> </ul>	Training	Short Term	C1, C2, C3, C5, C6, C9, C11, C13, C14, C15, D1, D2, D6, P1, P2, P3, P6, P8, P9, D2, D3, TR1, TR4, TR6, TR7, TR9, TR11, TR12, TR13

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Number	Describe Potential Solutions	Category	Implementation Level	Related Issue(s)
	<p>It is recommend to create a training schedule and determine the frequency of completion, and whether periodic refresher courses are required. It is also recommended to make a training course for the traveler and the travel arrangers.</p> <p>The recommended working group includes:</p> <ul style="list-style-type: none"> <li>• Departments from each University</li> <li>• University Payables</li> <li>• OBFS – Business Solutions and Support</li> </ul>			

Number	Describe Potential Solutions	Category	Implementation Level	Related Issue(s)
<b>4</b>	<p><b>Provide a travel guide of instructions to a traveler</b></p> <p>When a traveler receives approval on their travel plan, prior to travel, provide the traveler with a travel guide of instructions to follow and/or FAQs to know.</p> <p>Upon completion of the “Best Practice” for University Travel, create a summary guideline to be provided to a traveler</p> <p>The travel guidelines will be provided to the traveler by either the traveler arranger or a department business manager</p> <p>University Payables will create a template for the portion regarding Policies and Procedures</p> <p>The template will be available for a department unit to provide their own policies and procedures</p> <p>The working team will be represented by University Payables, University Department Units from each University, and OBFS – Business Solutions &amp; Support (BSS)</p>	Documentation	Short Term	C1, C5, C9, C11, C14, C15, D1, D2, D6, P1, P2, P3, P6, P8, P9, P10, D2, D3, TR1, TR3, TR4, TR6, TR7, TR9, TR11, TR14

Number	Describe Potential Solutions	Category	Implementation Level	Related Issue(s)
<b>5</b>	<p>We are recommending one system to provide the ability to:</p> <ul style="list-style-type: none"> <li>• Create travel plans</li> <li>• Obtain approvals pre and post travel</li> <li>• Provide documentations for the travel</li> <li>• Create and submit reimbursement requests</li> </ul>	Technology	Long Term	C7, C8, C9, D5, P8, T3, T4, T5, T6, T7, T9

## Chapter 16: Solutions Prioritization Matrix

The recommendation for improvements were reviewed and the potential solutions were prioritized by the Director Council. The below matrix contains the potential solutions for short term implementation and each ranked score.

Solution Prioritization Matrix: Travel Request, Approval, Booking, & Modifications								
	Describe Potential Solutions	Category	Ease of Implementation:	Permanence of the Solution:	Impact of the Solution:	Cost of the Solution:	Total Score (Average of The total product from each participant):	Ranking
			1 (very difficult) - 5 (very easy)	1 (temporary) - 5 (permanent)	1 (low) - 5 (high)	1 (high) - 5 (low)		
			Avg of attribute from each participant)	Avg of attribute from each participant)	Avg of attribute from each participant)	Avg of attribute from each participant)		
1	Request a T-card for a frequent traveler in a University College/Department or recommend the traveler uses a department travel arranger	Policy & Procedure	3.9	2.9	3.5	4.1	196.1	1
2	Define "Best Practice" for University Travel when conducting travel on behalf of the University of Illinois	Training	3.7	3.8	2.7	3.3	140.8	3
3	Create a travel training course available to people who travel on behalf of the University of Illinois	Training	3.3	3	2.7	2.8	86.9	4
4	Provide a travel guide of instructions to a traveler	Documentation	3.5	3	2.7	3.4	154.3	2

## Chapter 17: Future State SIPOC Diagram (same as Current State SIPOC)

Process Name				Date
Travel Request, Approval, Booking, & Modifications – Future State				August 2017
SUPPLIERS	INPUTS	PROCESS	OUTPUTS	CUSTOMERS
<i>Who</i> provides input to the process	<i>What</i> goes into the process	<i>How</i> the inputs are transformed to outputs	<i>What</i> comes out of the process	<i>Who</i> received the outputs of the process
Department Unit Principal Investigator (PI) Procurement Services Purchasing Traveler – External Traveler – University Vendors	Approvals Business purpose/justification Travel/Program advance request CFOAPAL Expense estimates Quote Reservations Travel Award information Travel research Traveler’s information	Identify need to travel Complete request to travel Receive approval Make travel arrangements Change/Modify Request	Airline ticket number Approval documents Cash advance (ACH, check) Confirmed reservations Reimbursement Expense details Invoice Purchase Order	University Student University Faculty/Staff Non-University Guest <ul style="list-style-type: none"> <li>• Student/Athletic recruits</li> <li>• Donor</li> <li>• Employee candidates</li> <li>• External collaborator</li> <li>• Former University Students</li> <li>• Sponsor</li> </ul>



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## Chapter 18: Future State Requirements

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This is a comprehensive list of functional requirements and technical requirements for the future state of the Travel Request, Approval, Booking, and Modifications process. Excluded from this list are any requirements for functionality outside of the scope of this specific process, such as security, accessibility, etc., which will be handled in a different process.

1. Ability to provide FAQ section and guided assistance throughout the system
2. Ability to have a mobile application that has access to:
  - a. Create a travel plan
  - b. Book reservation
  - c. Tickets/Reservation
  - d. Ability to capture receipts
  - e. Ability to enter expenses
  - f. Ability to submit expense reports
3. 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
4. Ability to have workflow to perform the following tasks:
  - a. Plan trip
    - i. Mode of travel
    - ii. Lodging
    - iii. Meals
    - iv. Travel participants
  - b. Enter documentation e.g. business purpose
  - c. Receive pre-approval on travel
  - d. Book travel
  - e. Receive confirmations of approvals/denials/inactivity
  - f. Enter expenses
  - g. Upload documentation, e.g. receipts
  - h. Create expense report
  - i. Receive approval
  - j. Ability to designate preferred vendors for all travel modes
  - k. Ability to track all approvals
  - l. Ability to see where a Task resides in the workflow
5. Ability to identify all transactions related to a single unique travel event
  - a. Reporting on single event with multiple expense reports
6. Ability to enforce business rules based on traveler
  - a. Ex: Student rules are different than non-University traveler rules

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7. Ability to identify type of traveler e.g. Student, Athlete, Faculty, University guest
8. Ability to store and enter personal information securely
9. Ability to store and enter personal travel preferences
  - a. Ex: Reward programs, seat preferences, etc.
10. Ability to enter travel credit vouchers and expiration dates
  - a. Ex: Unused airline tickets
11. Ability to have single or multiple business purposes/justifications on a single Expense transaction
12. Ability to identify within an expense report as to which Business Purpose/justification the expense applies
13. Ability to export any and all data to the University System Enterprise Data Warehouse
14. Ability to import data from another application (ex: iTravel)
15. Ability to link into other approved travel applications (ex: iTravel, F&S carpooling system)
16. Ability for a traveler to assign a proxy for his/her travel arrangement
17. Ability to generate multiple expense reports to a single unique travel event
18. Ability for the system to alert travel planner when a travel event already exists
  - a. Based on criteria to be determined by System Administrator (ex: UIN, date range, etc)
19. Ability to refer User to existing University policies related to travel
20. Ability to alert Users when thresholds have been exceeded
  - a. Ex: Hotel rates that exceed State-mandated maximums
21. Ability to capture reportable data as to the different categories the data may fall under
  - a. Ex: A single transaction may include travel, lodging, meals, etc. The system should alert Users to break out the various categories of travel types.
22. Ability to search within the system based on selected criteria of the data (ex: workflow #, traveler ID, approval status, etc.)
23. Ability to index images to a travel request

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## Chapter 19: Subject Matter Expert Team

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The following individuals participated on the Subject Matter Expert Team of the BPI Travel Request, Approval, Booking, & Modifications project:

Name	University/Department	Title
<b>Baker, Susie</b>	UIUC/OBFS, Univ Payables	Assoc Dir Payment Serv
<b>Behrens, DeAnn</b>	UIUC/AITS	Enterprise Syst Spec
<b>Day, Cara</b>	UIUC/Biochemistry	Biochemistry Department Office Manager
<b>Gabel, Andrew</b>	UIUC/Purchasing	Business/Admin V/Associate
<b>Hammons, Vernell</b>	UIC/Procurement Diversity	Supplier Diversity Coordinator
<b>Peffer, Helen</b>	UIUC/McKinley Health Center	Finance & Personnel Admin
<b>Travis, Teri</b>	UIUC/Office of University Audits	Enterprise-Wide Auditor
<b>Young, Cathy</b>	UIUC/OBFS, Univ Payables	Senior Coordinator Outreach, Education and Communication
<b>Zukosky, Susan</b>	UIUC/Information Trust Institute	Manager of Research Administration

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## Chapter 20: University Focus Group Participants

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The following list of individuals participated in a University Focus Group meeting either during the current state and/or the future state of the BPI Travel Request, Approval, Booking and Modifications project.

Name	University
Angie Helmuth	UIUC
Beth Etchison	UIUC
Carla Pierre Gini	UIC
Cheryl Churchill	UIS
Darce Dillavou	UIUC
Donna Coleman	UIUC
Emily Volk	UIUC
Faith Thurmond	UIC
Gail Trent	UIUC
Janet Ford	UIS
Linette Hughes	UIS
Magda Aldana	UIC
Michelle Osborne	UIUC
Myra Sully	UIUC
Sandra Heiregel	UIUC
Sherry Unkraut	UIUC

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## **Appendix A: Business Glossary**

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### **Corporate Travel Planners (CTP)**

Contracted vendor providing travel services to the University for University travel

### **CTP (Corporate Travel Planners)**

Contracted vendor providing travel services to the University for University travel

### **Illinois Higher Education Travel Control Board (IHETCB)**

Oversight committee regarding travel by State University employees

### **International Student Scholar Services (ISSS)**

Has a role when working with international students

### **iTravel**

Travel software application support by Concur

### **Principal Investigator (PI)**

The person who receives a grant, and is the lead research person on a research project

### **SIPOC**

A visual tool for documenting a business process from beginning to the end (Suppliers, Inputs, Process, Outputs, Customers)

### **Uniform Guidance (UG)**

The guidance to Federal agencies for uniform administrative requirements, and audit requirements on Federal awards.