Request Submission Sub-Committee

Date: January 31, 2019

Attendees: Laurie Jacoby, Katy Molloy Brady, Stacy Williams-Wright, Naomi Crowe, and Brooke Millett-Montgomery (Scribe)

Overview of agenda and talking points prepared for the meeting.

Research Area Differences:

Research/Grant travel is different and seems to be consistently exceptional compared to other travel on campus (academic or administrative side).

Budget on grants, the travelers have to be very particular or lose their grant. In some cases the PI approves their own travel, because they are ultimately responsible for the budget of the grant. In the grant world, business managers who are not PI's should not be signing off on grant budget items.

Proposal to have business managers make the decision whether their travelers submit or whether an admin submits requests on the traveler's behalf.

Knight Campus Proposed Model:

Customer service oriented process.

Admins serve as delegates and work with a specific group of travelers. The traveler has a "go to" delegate.

The traveler initiates the need for travel planning with their delegate via email, supplying the dates and business type (meeting, conference, etc.). Then the delegate works to find an airfare itinerary (and other travel needs, ie rental car, hotel) and submits the request. Some level of pre-approvals are happening now via email. The reason for this is that email is readily accessible to faculty researchers.

The piece that Naomi feels is critical is that the traveler reviews the itinerary purchased for them, though there isn't a mechanism in the program to do this and there is consensus that this piece may not happen consistently. **Is there a way to change workflow to in Concur to facilitate an approval of the flight?**

The need in her area is to streamline urgent travel, whether this be last minute travel or a travel change.

The main idea is that they cannot put more burden on their travelers. Their researchers don't have time or scope to get into Concur. They feel that their admin staff are better suited for this detailed task.

International Affairs Process:

The pre-trip communication process between the travelers, delegates, and approver is happening via email. The traveler lets the delegate know what they want/need for their conference, for example, and the delegate creates request and submits for the traveler.

In Katy's area they upload the email approval to the request as a document trail. **Is this an adequate control point?**

Miscellaneous notes:

Traveler emails, delegate enters and submits, budget authority reviews for accuracy of what was requested in the email, challenge area is that the traveler needs to review the itinerary in order to approve for accuracy. Though there is no action step where the traveler actually has to review their ticketed itinerary.

People who know very little about travel policy are taking their time to review and approve in Concur. They are reporting that it is taking longer for them than when they reviewed a paper packet in Duckweb. Is there possibility of notes being placed into Concur that guide an approver to what they need to look at in order to foster an efficient approval flow?

Questions and ideas to ruminate on:

Can we adjust groups and workflows to accommodate some of these ideas and still keep good business practices and control points?

As we widen our use of Groups in Concur (for processing and unique workflows), how will Concur and campus process for faculty who work in multiple areas on campus? What can we do in Concur to support an appropriate workflow for faculty multi-appointments? What are training points for campus travel coordinators to foster cooperation and communication between departments who share a faculty member?

Can cost object approval play a role in the request approval process?

Drawing lines around different request processing models to marry flexibility and order.