Published on *University of Colorado* (https://www.cu.edu)

CUSP (CU I&E) Submission: CIRES Travel Pre-Approval and Tracking Process [1]

Description

Lisa Ho is the CIRES (Cooperative Institute for Research in Environmental Sciences) software developer and database Administrator. We (Marc Cloninger, Andrea Dietz and Jeana Thayer) worked with Lisa to design an on-line travel request web site. On average, CIRES has over 100 employees traveling each month predominantly on federally-sponsored projects. CIRES travelers are now able to log in to our password-protected Intranet site- 'InSide CIRES' - and submit their travel requests electronically. By capturing the data entered by the traveler, we eliminated the need for data entry that was previously performed by CIRES finance staff to create travel approval e-mails and to track the details of each trip on an Excel spreadsheet. Through the on-line request, an approval e-mail is now automatically generated at the push of a button based on the information provided by the traveler and every approved trip is filed in a search-able database. If CIRES finance has a question for the traveler or needs more information before a travel request can be approved, there is also a section on the request where such questions can be automatically emailed to the traveler. Back-up documentation, such as e-mails from NOAA lab supervisors, or comparison quotes for airfare involving personal travel, is now uploaded directly to the on-line request by the traveler. Per diem rates are also calculated automatically based on the traveler's destination(s) and cross-referencing the federally approved per diem table.

On the front end, the site consists of a ‘dashboard’ where employees can submit a new request and view all un-submitted, pending, and approved requests. On the back end, we (CIRES finance) are able to search all requests, submitted and approved, using any field we prefer: speedtype, traveler's name, destination, project number, etc. The database is a php database maintained by Lisa. Please see the attached document for a screen shot of the management page with comments. Before this on-line system, the simplest requests would take close to 15 minutes to complete. This used to involve looking up the per diem rate(s), composing the approval e-mail, entering trip details into a spreadsheet, completing a cover sheet, and printing the approval e-mail and all other pertinent documents to be filed in a physical travel request bin. All of these steps are now handled on-line and, after the various checks of the funding source have been made, we can click an "approve" button to send the approval e-mail. That approval e-mail is automatically attached to the request along with all other necessary documents that were uploaded by the traveler.

How does this impact the University?

CU received $412M in sponsored project funding in FY 2014 alone. CIRES is consistently in the top three departments of the Boulder campus for the highest volume of monthly employee

travel. Sponsored project travel expenses are typically high visibility expenses for auditors. With such a high volume, CIRES wanted to create a more effective and efficient system for managing travel requests. The design of our on-line request had to incorporate the requirements at all levels of a sponsored project: award, department, campus, state and federal. By using an on-line system, we have been able to maintain the integrity and details of our department's travel requests, but in a much more efficient, digital and centralized manner. It saves our Department, and effectively the University, both time and effort of a mandatory approval process. Our hope is that by posting the concepts of our on-line travel request system on CUSP, the University may be able to use it as a model to create an on-line travel request system for other departments. A University-developed on-line travel-approval system would increase the efficiency of this typically tedious process for all departments managing travel requests and particularly for those departments managing sponsored project travel.

Implementation Status

After several weeks of testing, the website was launched in June 2014. We designed the system so the request process would be as simple as possible for our travelers to navigate, but we fully anticipated the need to host training sessions once the site went live. We were pleased and surprised to learn that such trainings were not needed by CIRES employees due to the intuitive nature of the site. The vast majority of the feedback we received from travelers and the rest of the CIRES finance team was positive. In summary, the implementation of the travel request website has dramatically reduced the amount of effort required to prepare, submit, approve and track our travel requests.

Submitter's Information

Submitter's Name: Marc Cloninger
Submitter's Email: marc.cloninger@colorado.edu [2]

Source URL:https://www.cu.edu/controller/i-e-awards/past-submissions/cusp-cu-ie-submission-cires-travel-pre-approval-and-tracking

Links
[1] https://www.cu.edu/controller/i-e-awards/past-submissions/cusp-cu-ie-submission-cires-travel-pre-approval-and-tracking [2] mailto:marc.cloninger@colorado.edu