Libraries Process for Requesting Professional Development Funds

The purpose of the document is to provide information about the libraries processes for approving professional development (PD) funds. UTA Libraries is committed to supporting the professional growth of all staff by budgeting for development opportunities. To help Director's plan and allocate these funds responsibly, we ask that staff identify their preferred professional development activities and associated costs as early in the fiscal year as possible. This will allow Directors to fairly and holistically evaluate requests within each department. Employees should refer to the University's guidelines for travel outlined at the Business Affairs and Controller's website when drafting their travel budgets.

Requesting Libraries Professional Development Funds

Use the Libraries Professional Development Request Budget Spreadsheet.xlsx to create an estimate cost to enter into the Libraries Professional Development Request Form and to have the basic information to enter into Concur at the creation of a Travel Request. The completed spreadsheet is uploaded into the Libraries Professional Development Request Form.

There are six different tabs that contain helpful information for the traveler or is an input for PD specifics and the budget specifics:

- Traveler Information – Your name and email, Libraries Dept #, Speedtype/Cost Center drop down menu, Fund Code, Business Unit.
- Event Information – Enter the event details.
- Budget Information – Enter the budget details. Includes links to GSA website and Per Diem Calculator spreadsheet.
- Dept Speedtype & Fund Code – Informational and used for the drop-down menu in Traveler Information - Speedtype/Cost Center drop down menu.
- Organizational Memberships – All list of the libraries organizational membership.
- Travel Guidelines – Links to the travel guidelines.

Libraries Professional Development Request Form

- Libraries form used to request PD funds, aid in the decision-making process to help ensure that professional development funds are distributed fairly and effectively across the department, and facilitate consistency across the libraries.

Libraries Professional Development Travel Request Form Job Aid.pptx

- Informational tool to aid in navigating the process.

Libraries Approval Process:

The employee discusses the professional development plan with both their immediate supervisor and the Director of the department. Departmental leadership has the same discussions with their AUL or Dean, as appropriate. The Concur Travel Request requires the immediate supervisor to approve the request. The Director, AUL, or Dean approves the Libraries Professional Development Request Form as they are responsible for the PD budget for their department and tracking those expenses. This approval process is outside Concur.

Tracking Travel Expenses in Concur:

- The Reporting Intelligence in Concur is hierarchal in nature. This an accurate and efficient travel and expense reporting tool.
- The Dean can see the entire organization in the reporting. The AULs, can see all their departments. The Directors their whole department, and supervisors their direct reports.
- The Director of Organizational Operations will have a reporting view of the organization tied to Audit Reports versus the direct report hierarchy.

Requesting Administrative or Additional Libraries Professional Development Funds

- This will be handled via an email request to the Dean versus as form. The Director of the Department or the AUL will submit the request in an email that includes the pertinent information as to who, what, where, when, and the justification to aid the Dean in the decision-making process. This is to help ensure that professional development funds are distributed fairly and effectively across the department and facilitate consistency across the libraries.

UTA Pre-Travel Requirements:

DIS-T-GL2 Pre-Travel Requirements – All Fund Types Guideline

Travel Request - Purpose of Travel

- A Concur Travel Request ("Travel Request") is required and is used to authorize official University business travel regardless of if there is, or is not, a cost to UTA.
    - If it is a local in and around town, you don't need one. If there is an overnight stay, rental car, or airfare involved, then one would be needed even if there is no cost.

Travel Request - UTA Employees and Students

- An approved Travel Request is required before a trip occurs, whether or not there is a cost to the university. The Travel Request must clearly state how the university will benefit from the trip including, but not limited to, what is learned that can be brought back to the classroom/department/office, or that it is beneficial to the performance of other duties, or other essential criteria.
- The Travel Request can be completed by the department. The traveler must certify the Travel Request. The document will then require approval by the traveler's immediate supervisor. A Travel Request will state the traveler's name, dates of travel, destination,

purpose and benefit of travel, and the expected funding source(s) that travel expenses will be charged to.

- The Travel Request encumbrance must reasonably reflect the anticipated cost of the trip.
- If there is no cost to the university, the Travel Request may reflect an encumbrance of $ 0.01.
- For information on how to complete the Travel Request in Concur please see Knowledge Services Training Resources.

Concur Approval Process

The Concur approval process follows the same process for approval in UT Share up to the library admin funding approvers.

- The employee submits a Travel Request.
- It is routed to the immediate supervisor for approval.
- It is routed to the library admin funding approver.
    - The difference between UT Share and Concur Workflow Approval is UT Share sends an email to all the Approvers, unless the Approver is the Traveler, then the Traveler gets skipped. Concur sends it to the Approver with the oldest EMLP ID, unless that Approver is the Traveler, then the Traveler gets skipped, and it goes to the next Approver.
    - The Libraries Funding Workflow Approvers are the Dean, Director of Organizational Operations (Oldest EMPL ID), and AUL Organizational Excellence (for HR transactions).
    - UT Share Level V Access is required for Funding Workflow Approvers.
    - If the immediate supervisor is also a Funding Workflow Approver, approving at the supervisor auto approves at the Funding Workflow Approval level.