

**UC Tech Awards 2023 Candidate**

**Category:** OPERATIONAL EXCELLENCE
**Name:** CruzFly Expense Reporting System
**Number of people:** (5)
**Location:** UC Santa Cruz

1. **Person submitting the application/nomination**: Biju Kamaleswaran, Associate Vice Chancellor/Campus Controller, Financial Affairs, UCSC, Staff
	1. **Email address:** biju@ucsc.edu
	2. **The name of your organization:** UCSC
2. **Award category:** Operational Excellence
3. **Name of person, name of the team, or name of the project to receive the award**

**Project Name:** CruzFly Expense Reporting System

1. **All project team members:**
2. Jesse Elias, Financial Information Systems Senior Analyst, Enterprise Financial Systems, UCSC, Staff, jcelias@ucsc.edu
3. Scott Hyatt, Programmer/Analyst, ITS-Technology Engineering, UCSC, Staff, shyatt@ucsc.edu
4. Tamara King, AP-Supervisor, FAST / Accounts Payable, UCSC, Staff, tjking@ucsc.edu
5. Matt Kling, Accounts Payable / EMF Accounting Director, FAST / Accounts Payable, UCSC, Staff, makling@ucsc.edu
6. Monique Leduc, Enterprise Financial Systems Director, Enterprise Financial Systems, UCSC, Staff, mleduc@ucsc.edu
7. Ryan Maddox, Financial Information Systems Manager, Enterprise Financial Systems, UCSC, Staff, rmaddox@ucsc.edu
8. Glen O'Neil, Financial Assistant III, FAST / Accounts Payable, UCSC, Staff, glenhere@ucsc.edu
9. **Which location was affected by the work?** (the name(s) of the organization affected)

 University of California, Santa Cruz

1. **Summary**: The ​CruzFly Expense Reporting System has transformed the employee experience with CTE-Card reconciliation and expense reporting from a labor-intensive, paper-driven process, to being automated and paperless. It improved efficiency and speed while serving the University's sustainability mission. EFS’s project generated significant efficiencies for UCSC employees and developed a more reliable and effective control for University spending.
2. **Narrative**

In 2019, the Enterprise Financial Systems (EFS) team at UCSC initiated a project to streamline the University’s Corporate Travel and Expense (CTE) reimbursement process with the result being UCSC’s CruzFly Expense Reporting System.

UCSC reimburses over $3.4 million campus-wide. Prior to this effort, expense accounting was paper-driven and required the accounting department to reconcile all receipts. Because of the required effort, EFS identified expense reimbursement as a project that could generate significant efficiencies for UCSC employees as well as develop a more reliable and effective control for University spending.

The project was well underway when the pandemic hit the campus in March 2020, slowing implementation of the pilot of the new system until January 2021. Full CTE-Card implementation into CruzFly occurred at the end of FY 2022. The team is continuing to grow the project in FY 2024 and FY 2025 to include P-Card implementation as well as direct pay reimbursement.

For implementation, EFS identified the Chrome River software solution to serve as the backbone of the system. Chrome River is a configurable expense management system geared toward managing enterprise-wide solutions. As part of the project rollout EFS invited the campus community to pitch a product name and a system mascot, which resulted in our CruzFly branding.

**CruzFly has digitally transformed the business process for expense reporting.**

* Employees use the system to report and obtain authorization for travel, entertainment, and other types of expenses.
* Employees upload receipts and fill out requested information about their expenses, then submit for department approval.
* The initial rollout included Travel Reimbursements and CTE-Card transactions.
* CTE-Card transactional data is uploaded directly from US Bank into the CruzFly system streamlining the reconciliation process.
* Travel advance requests are no longer processed, eliminating several steps in the travel process and drastically improving cash management for the accounting team. In lieu of travel cash advances, employees use CTE-Cards or direct billing through Connexxus or UCLA travel.

**Implementation of CruzFly was a complex project that utilized seven team members over a 23-month timeline.**

* EFS created a full Production environment and developed multiple iterations of the system and application which were successfully tested prior to launch.
* Integration testing was conducted with FIS for user, approvals, and chart-of-accounts loads.
* Business rules and user messages were developed, reviewed, and updated as needed.

**After testing, the EFS team implemented a rolling implementation plan, bringing units into the system in batches.**

* Templates were provided to units to collect information on Budget approvers and any additional unit employees that should be loaded.
* System reporting functionality evolved throughout the process, allowing EFS to systematically upgrade the reporting to meet the needs of units as they onboarded into the system.
* EFS made user guide materials and orientation/training resources available for users.
* For ease of access, the system utilizes single sign-on (SSO) authentication for login.

**Success for the program is measured in its utilization and the overall efficiencies realized by the University from the project.**

* The program has achieved 100 percent adoption by CTE-Card users.
* The program has achieved significant growth since implementation:
	+ In FY 2019, $1,623,933.96 in reimbursements utilized paper processes.
	+ In FY 2021, $10,200.55 of that work transitioned to CruzFly.
	+ As of today, $3,415,508.59 is being managed through CruzFly.

With CruzFly, EFS has identified and implemented business process improvements and productivity tools that introduced automation and reduced manual and paper-based workflows, improved speed of business transactions through electronic approvals and self-service options, and enabled remote accessibility of documents while maintaining appropriate record retention policies. The benefits have significantly improved efficiency and effectiveness in campus operations.

CruzFly has transformed the employee experience with CTE-Card reconciliation from a labor-intensive, paper-driven process, to an automated, streamlined, paperless one that improved efficiency and speed, while serving the University's sustainability mission.

**Feedback**

*"CruzFly has been a welcomed system in our department. We are adjusting to the learning curve, and it has already made a world of difference in streamlining the reconciliation process."* - A&R

*“Having used CruzFly, I am keen on helping CP/EVC get up to speed on the system.”*

- CP/EVC Office

*“Big learning curve on CruzFly, but I like it.”*

- Institute for Social Transformation