

## BRADLEY PASS PROCEDURE

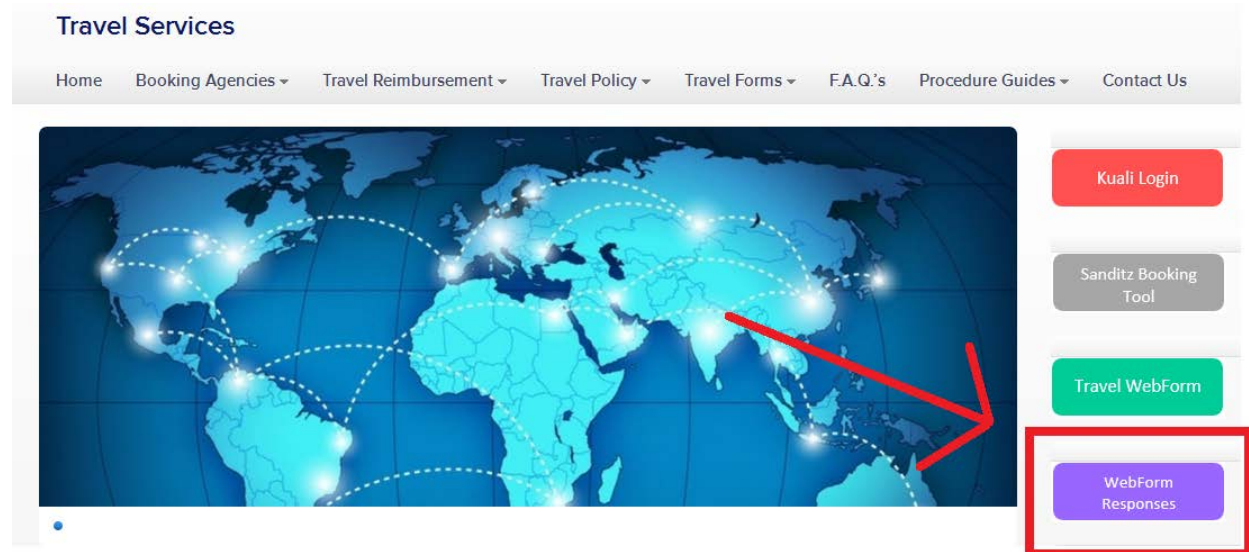
### Policy and Procedure Overview

- 1. You will first generate a list of all UConn employees requesting a Bradley parking pass for their business travel.
  - This is done by logging into the Webform Responses, filtering the results to display travelers requesting Bradley passes, then running the Macro in order to organize the results into an Excel file.
- 2. You will then filter out all travelers eligible for a Bradley parking pass in this Excel sheet with a tab labeled with today's date. You will look for:
  - Personal days
    - Passes can't be issued for any personal time
  - International travel
    - International travel must be processed prior to Bradley pass processing
  - Multiple Webforms submitted from the same traveler
    - Sometimes an extra Webform is submitted by accident
    - Some include personal time and are listed separately
  - Traveling for more than 14 days
    - Bradley International Airport only allows us to write passes for a maximum of 14 days
  - Missing addresses
    - If no address is listed, the traveler should be contacted so we know where to mail their pass
  - Travel destination is NC or MS
    - There's a travel ban to these states, and we cannot issue a Bradley pass for travel here, even if they have approval from the Controller for their travel.
  - If they're a student
    - Undergraduate students are not eligible for Bradley parking passes.
    - Only employees of the University (including Graduate Assistants) traveling on State business are eligible for a Bradley permit.
- 3. Then you will finalize, print and mail passes to the eligible travelers
  - Finalizing the passes is done in their Travel Webform at the bottom of the page
  - You can only print from data that's in the yellow "Data" tab, so you will move the data from the tab with today's date to this tab in order to print
  - When dispensing passes, they will either be
    - 1. Picked up at the Travel office if traveling within 5 business days
    - 2. Mailed to an on-campus U-box
    - 3. Mailed to a Hartford campus
    - 4. Mailed in a white envelope to be stamped to any other campus or address
- Finally, you will email any travelers with questions/concerns or additional information regarding their parking pass.
  - Many of these emails you'll send have to do with eligibility of travelers to get a pass, listed in Step 2.

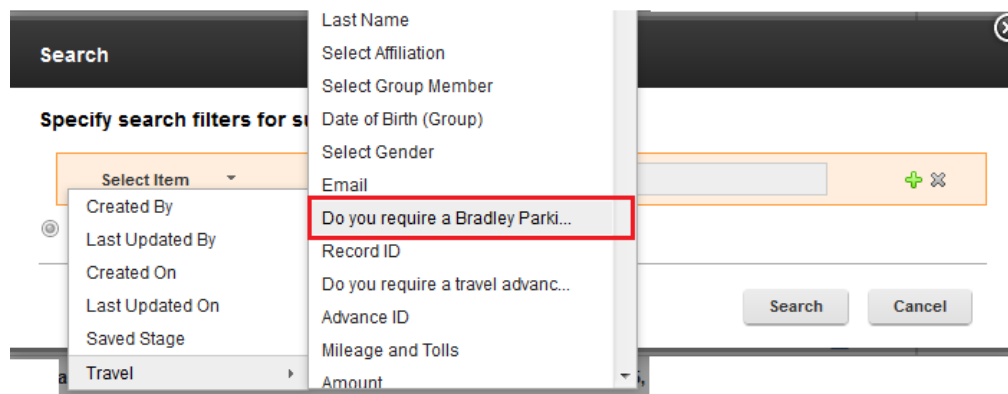
## TO RUN THE MACRO:

This generates a list of all UConn employees requesting a Bradley pass.

1. Go to [travel.uconn.edu](http://travel.uconn.edu) and click on Webform Responses.



2. Sign in with your NetID and password.
3. Click on "Create Filters."
4. Click "Select Item," then go down to "Travel" and select "Do you require a Bradley Parking Pass."

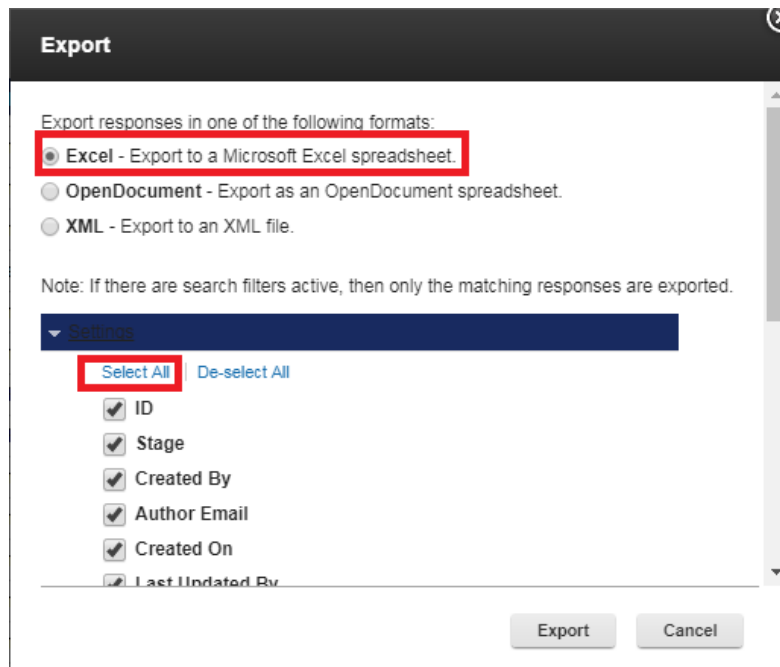


5. Next, under "Choose Operator," select "Equals."
6. In the text box, type in "Yes."
7. Click the green plus sign.
8. Click "Select Item" for the new line that was just added, and select "Saved Stage" from the list.

9. Under "Choose Operator" select "Equals."
10. Under the drop down menu, select "Pre Trip – Travel Services."
11. Click the green plus sign again and select Travel → Departure Date from the drop down menu.
12. Under "Choose Operator" select "Before" and choose the date three weeks from the current date.
13. Make sure "And" is checked off at the bottom of the box, and click "Search."

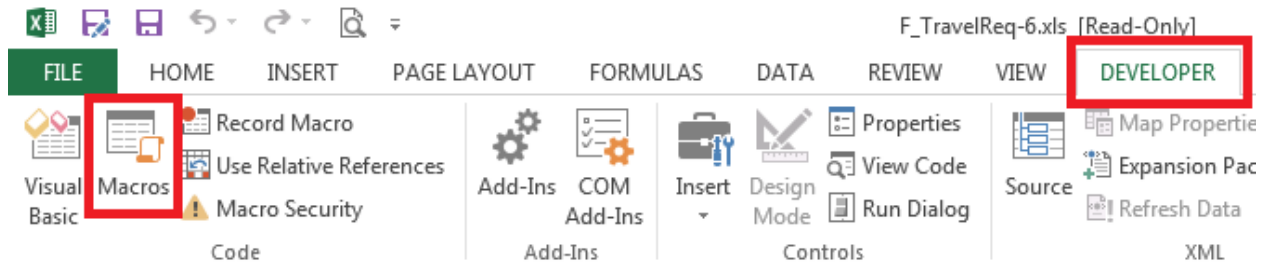
This will now display the results of every traveler that requested a Bradley permit for their trip occurring within the next 3 weeks.

14. In the Q drive, go to AP → Travel → Bradley Passes → Instructions and open the Excel document "BDL Macro.xls."
15. On the Webform page, click "Export Data" and then select "Excel – Export to a Microsoft Excel spreadsheet" and then click the blue tab titled "Settings."
16. Click "Select All," then click "Export."



17. When prompted, select "Open with Microsoft Excel" and click "OK." A new Excel document will open up.

18. In this new Excel document, click the “Developer” tab and then select “Macros.” When the Macro window pops up, click “Run.”

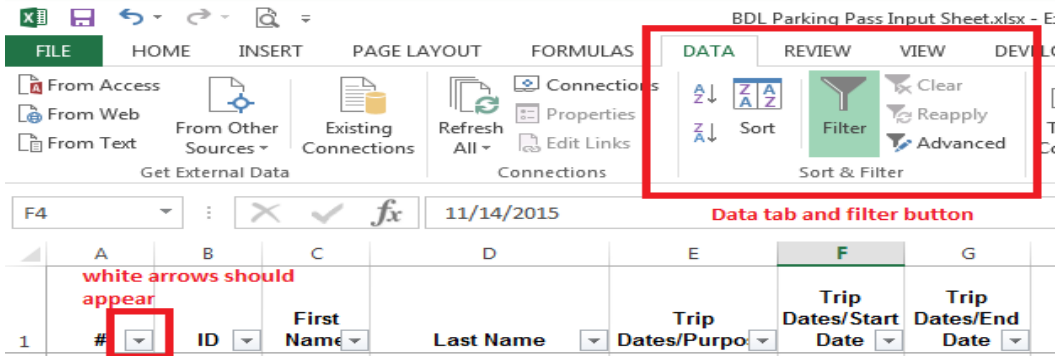


19. Close out of “BDL Macro.xls” and **DO NOT** save.
20. Open up the Excel document “BDL Parking Pass Input Sheet.xlsx” from the Q drive and click on the plus sign at the bottom of the file. This will open a new tab titled “Sheet1”
21. Right click on the “Sheet1” tab and select “Rename.” Name is as today’s date.
22. Return to the Excel document titled “F\_TravelReq.xls” where the Macro was run.
23. In this Excel document, copy from box A1 down until the last name and across until “Traveler Email.”
24. Go back to the “BDL Parking Pass Input Sheet.xlsx” Excel spreadsheet and paste this information into the tab of today’s date.
25. Close out of the Excel document “F\_TravelReq.xls” and **DO NOT** save. The only Excel spreadsheet that should be open now is “BDL Parking Pass Input Sheet.xlsx.” Go back to this file.

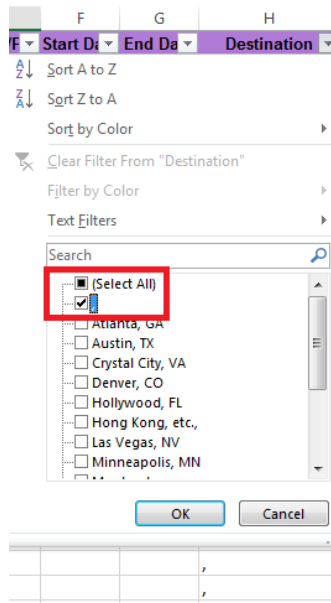
#### TO ORGANIZE THE INFORMATION FOR PRINTING:

This process organizes the information from the Webform and also helps you flag travel that may need to be adjusted.

1. In row 1, make sure that there are drop-down arrows in each box.
  - a. If there are not, click the column “1” and make sure all of row 1 is highlighted. Select “Data” from the tabs at the top of the screen, and then select “Filter.” Now the white arrows should appear.

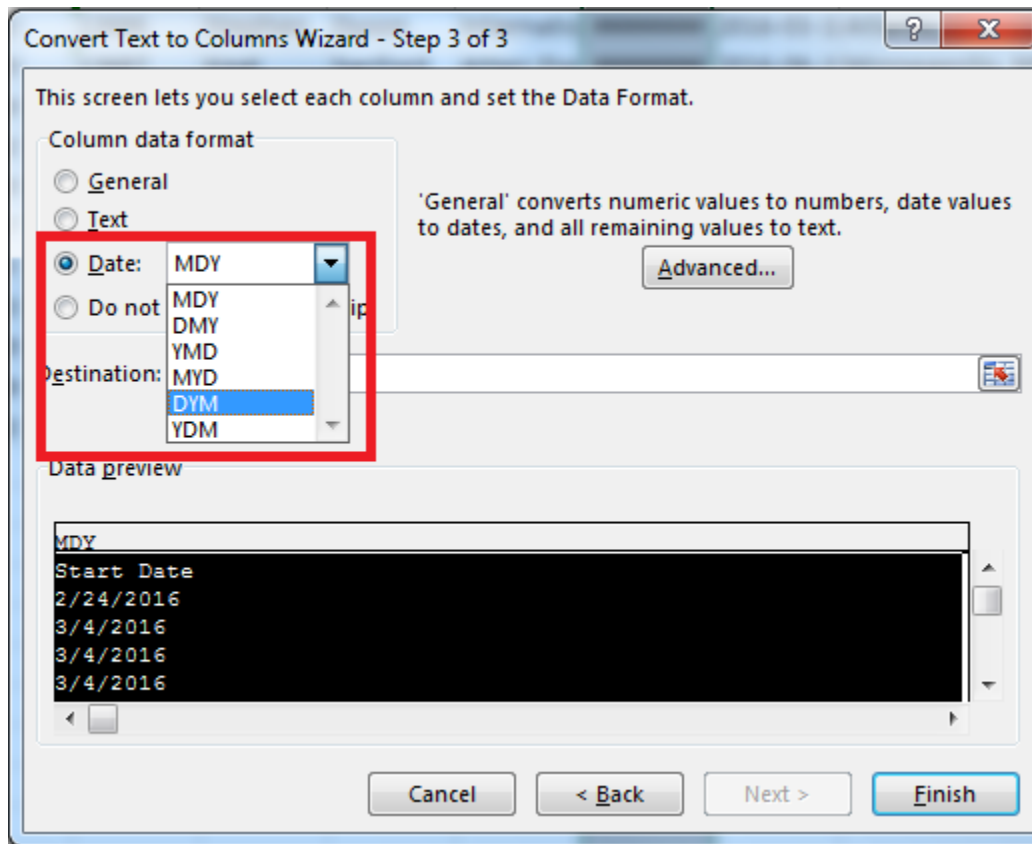


- In column H, commas should appear in some of the boxes between names. Select the white arrow on this column and uncheck "Select All" and check only ",". Click "OK."



- A screen with only commas should appear. Select from box A2 across and down to the last comma. Right click and select "Delete Row." Click "OK."
  - Make sure not to select the top row that is filtered (with the white arrows) – you want to keep this.
- Go back to the "Data" tab at the top of the screen, and under the Filter section, click "Clear." There should now be no blank rows or commas between names.
- Click on the letter F, which should correspond to "Start Date" so that the entire column is highlighted.
- Under the "Data" tab at the top of the screen, click "Text to Columns." A new window will pop up. Click "Next" twice.

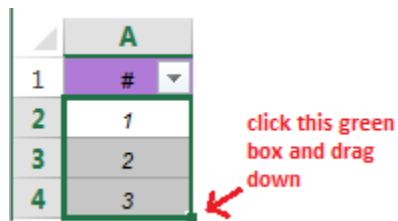
7. Click "Date" on this window. Under the dropdown menu, select "DYM." It should be the second to last option. Click "Finish."



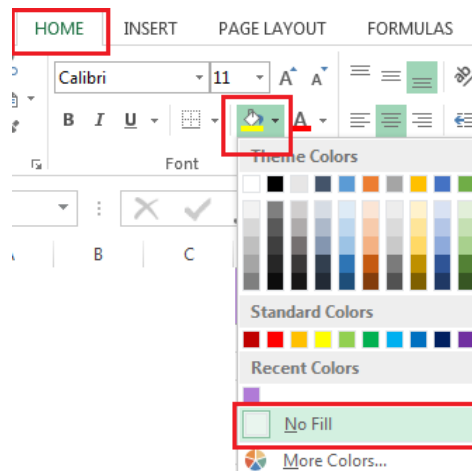
8. Repeat this step for the next column over, "End Date," which is column G.
  - a. If the dates now appear as number signs, expand the column to fit the entire date.
9. Filter the spreadsheet by Last Name by clicking on the white arrow next to "Last Name" under column D and selecting "Sort A to Z." If any names are repeated, highlight the names.
10. Go to the "Data" tab at the top of the screen and under Filters, click "Clear."
11. Filter the spreadsheet by Personal Travel by clicking on the white arrow next to column J "Personal Travel" and unchecking "Select All" and checking "Yes." Click "OK." A list of only those travelers who have indicated personal days should appear. Highlight the "Yes" results in red.
12. Go to the "Data" tab at the top of the screen and under Filters, click "Clear."
13. Filter the spreadsheet by U-box by clicking on the white arrow next to "U-box" (usually column L), and then unchecking "Select All" and scrolling down the list to check "(Blanks)." Click "OK." A

list of travelers that have not provided a U-box number will appear. Highlight the blank boxes under the U-box column for each traveler.

14. Go to the “Data” tab at the top of the screen and under Filters, click “Clear.”
15. Filter the spreadsheet by International Travel by clicking on the white arrow next to “INT” in column M and unchecking “Select All” and checking “Yes.” Click on “OK.” A list of only those who are traveling internationally will appear. Highlight the “Yes” results in red.
16. Go to the “Data” tab at the top of the screen and under Filters, click “Clear.”
17. Now, click the white arrow on the “Start Date” column and click “Sort Oldest to Newest.” Click “OK.”
18. On the column labeled “#” (usually column A), click box A2 and type in the number “1.” In box A3 type in the number “2,” and in box A4 type in the number “3.” Highlight these three numbers and then click the small green box in the bottom right-hand corner of your selection and drag it down until the last traveler name appears. The numbers should now be in order.



19. Now, click the yellow “Data” tab at the **BOTTOM** of the document. Highlight all the information in this tab from box A2 all the way across and down to the last traveler, making sure not to highlight the colored and filtered row at the top.
20. On the “Home” tab at the top, click the Fill icon and select “No Fill.”



21. Then, right click the same selection and click “Clear Contents.” Do **NOT** click “Delete.”
  - a. This is very important. Otherwise, it will mess up the formulas in the document.
22. Go back to the tab on the bottom that was titled with today’s date and select all the information from A2 until the International Travel column (not including the Travel Webform ID or the emails) and copy it.
23. Go back to the “Data” tab again at the bottom of the screen, click on box A2, and paste.

The spreadsheet is now all set so that Bradley permits can begin to be printed.

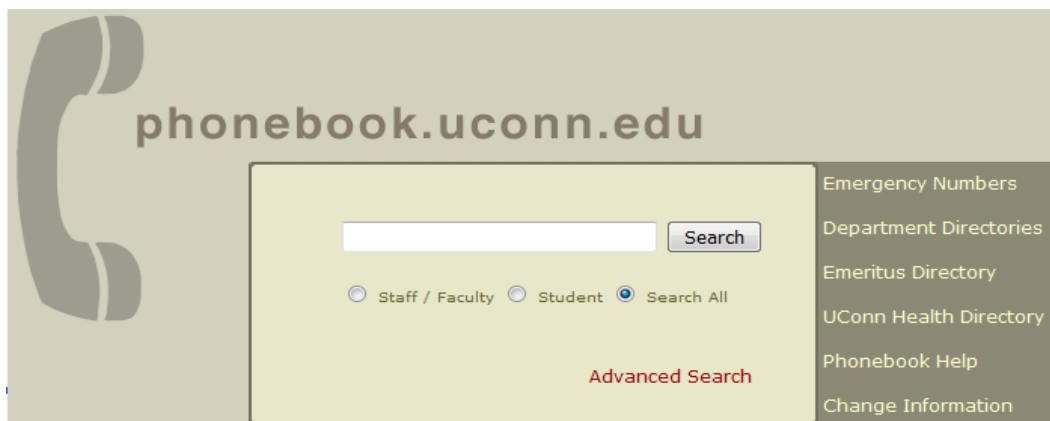
#### WHAT TO CHECK BEFORE PRINTING A PERMIT:

Filtering travelers eligible for a Bradley parking pass

The “Data” tab contains all the information of the travelers who requested a Bradley parking permit for their trip. Do **NOT** filter or change anything in this tab. The information in this tab needs to be checked before we can issue a Bradley permit to the traveler. Start with the first row and look at the traveler’s information.

***If, under column L titled “U-box,” a box is highlighted (The U-box number is missing):***

1. Look at their trip dates. If they’re leaving within 5 business days, you can issue a pass and the traveler needs to come in and pick it up.
2. If the traveler is not leaving within 5 business days, go to “phonebk.uconn.edu” in a separate internet tab (make sure to keep the Webform responses tab open) and type in their name into the search box.



The screenshot shows the website phonebook.uconn.edu. On the left is a large grey telephone handset icon. The main content area has a search bar with a "Search" button. Below the search bar are three radio buttons: "Staff / Faculty", "Student", and "Search All" (which is selected). Below these is a link for "Advanced Search". On the right side, there is a vertical menu with the following links: "Emergency Numbers", "Department Directories", "Emeritus Directory", "UConn Health Directory", "Phonebook Help", and "Change Information".

3. When the results come up, type the corresponding U-box number or UConn campus that’s listed into the Excel sheet.



- a. If it comes up that they're a student, email them to find out if they're an Undergraduate student or a Graduate Assistant (both will show up in the phone book as "Student").
  - i. Example email: Hi Traveler, In order to process the Bradley parking pass you requested for your travel to this city, could you provide me with you status at the University (Undergraduate student, Graduate Assistant, etc)? Also, please let me know the best on-campus Unit box to mail your pass to. Thank you, Your Name
  - ii. Graduate Assistants are eligible for Bradley permits, Undergraduate students are NOT.
4. Make a note in the Excel sheet in the tab labeled as today's date next to the traveler's information that you have emailed this person asking about their U-box.
5. When you receive an email response, enter the U-box number and issue them a parking pass if there are no other outstanding issues with their travel.

***If, under column M, the box is highlighted/says "Yes" (they are traveling internationally):***

1. In the Q drive, go to the following folders: AP → Travel → International Health Insurance → Insurance Issued → The folder corresponding to this year (Example: "2019") → The folder corresponding to this month (Example: "October") → The most recently saved "sent" file (Example, "Sent 10.21.2019.xls")

In this file, there is a list of names of travelers who are being processed for international health insurance.

The international health insurance **MUST** be done prior to printing a Bradley pass.

2. Find the traveler's name corresponding to the traveler on the "Data" tab of your Excel sheet.
3. If the traveler's name is highlighted in anything **BUT** red, this means their international health insurance has been processed and you can go ahead and issue a Bradley permit
4. If the traveler's name is not listed in the file, this means their insurance hasn't been processed yet and a Bradley pass can **NOT** be issued.
  - a. If the international health insurance has not yet been processed, go to the tab in your Excel document of today's date and make a note next to the traveler's name that health insurance has not yet been done and their pass cannot be printed at this time.

***If, under column J, the box is highlighted/says "Yes" (the traveler is taking personal days):***

A traveler cannot receive a Bradley permit for personal days. They can only park at the airport if it's for business travel.

1. Check to see if the traveler's name is **ALSO** highlighted, which indicates that this traveler's name is listed more than once in the list of people requesting a Bradley pass. It is possible, and

common, that the traveler's name is listed more than once because they are going on both business and personal travel, and have listed these in two separate rows.

2. If the traveler's name is also highlighted, look for the other row or rows that they are in.
  - a. If the dates are consecutive, such that one would be from 2/15/2019-2/17/2019, and says "No" in Column J, and one row says 2/18/2019-2/19/2019 and DID indicate "Yes" in Column J, then you will print a pass for ONLY the business days listed and ignore the row containing personal days. A pass will NOT be printed for the second listing of this traveler in the file where they indicated "Yes" for personal travel.
    - i. Usually in this case, the ID numbers in column B are the same for the same traveler listed twice.
  - b. If the dates are not consecutive, this means the traveler is going on two separate trips. In this case, they selected "Yes" to personal travel for the entirety of one of the trips and must be emailed about which dates are personal and which are for business.
    - i. For the trip that says "No" for personal days, the traveler may be issued a pass
    - ii. Usually, the ID numbers in column B will be different in this case.
3. If the traveler's name is not highlighted, but Personal Travel is highlighted, then they must be emailed. Most likely, they submitted their Webform incorrectly and indicated their entire trip as personal when only a couple days out of the total trip were personal.
  - a. Sometimes travelers put "Yes" when it asks if there are personal days included in the trip, but they don't specify which dates are personal travel and which are business.
4. If a traveler needs to be contacted regarding their personal days, make a note next to their name.
  - a. ALWAYS first check to make sure the Traveler didn't already specify their personal days in other places
    - i. The traveler may have left a pre-trip note at the bottom of their Webform they submitted. Check to make sure they didn't leave a note here about which days they're taking as personal
    - ii. The traveler may have already been emailed. Check the Travel inbox to make sure before sending a duplicate email.
  - b. If the traveler did not specify their personal days, you may go ahead and email them. There's no need to cc the initiator.
    - i. Example email: Hi Traveler, On the Webform submitted for your trip to City from These Dates, you indicated that there is personal travel. In order to process your Bradley parking permit for this trip, could you provide me with the exact dates you'll be traveling on business and which dates you'll be taking personal time? Thank you, Your Name
6. When you receive an email response or if you find the traveler did specify their personal days in either the Travel Webform or an email, adjust the trip dates manually in the Excel file in the "Data" tab. You will enter the date adjusted to exclude personal days.

- a. *If the personal days are at the end of the trip:* for example, if the traveler responds saying that they are traveling for business from 2/15/2019-2/17/2019 and their personal travel is 2/18/2019-2/19/2019, you will only write the date as 2/15/2019-2/17/2019.
- b. *If the personal days are at the beginning or middle of a trip:* count the amount of personal days they are taking and subtract them from the END of the trip dates instead of the beginning.
  - i. Personal travel days will always be taken off the end of a trip, and the departure date will always remain the same.

***If the traveler's name is highlighted (their name is listed more than once in the file) but no personal travel ("No" in column J):***

1. Find every row in the file where the same traveler's name appears (they should all be highlighted) and compare their trip dates.
2. *If the trip dates are consecutive:* (for example, one row says 2/15/2019-2/17/2019 and the next row containing their name says 2/18/2019-2/22/2019)
  - a. You can print one pass from the very first departure date to the very last return date (you would print 2/15/2019-2/22/2019).
    - i. You will manually input this information into a new blank row, copying all the information into this new row except for the date, where you will manually type 2/15/2019 as the Start Date and 2/22/2019 as the End Date.
  - b. Usually in this case, the traveler is going to two destinations on business without coming home in between, so they listed two different locations on their Webform, making it show up as two separate lines in the Excel.
  - c. Usually the ID number in Column B will be the same in both rows that the traveler's name appears.
3. *If the trip dates are not consecutive:* the traveler will need multiple, separate passes printed for these trips. For example, if their name lists a trip from 2/15/2019-2/17/2019, and in the next row with their name it lists a trip from 4/19/2019-4/22/2019, then you will print one pass for each row the traveler's name is highlighted (one pass for each trip).
  - a. Usually the ID number in Column B will be different.
4. *If the traveler has overlapping or similar trips:* you need to email them and ask what their correct trip date is.
  - a. This means the traveler has submitted multiple Webforms (indicated by different ID numbers in column B) for the same trip, but have changed something
5. *If the traveler is showing up twice for the EXACT same trip:* you may pick one line to print and one line will need to be finalized in the Webform without processing anything or printing.
  - a. This means they submitted a Webform twice for the same trip by accident.
  - b. Go into the Webform for the duplicate trip and click "Finalize and Do Not Send Email" at the bottom of the page.

***If the dates of travel are more than 14 days:***

1. Count 14 days from the start of their trip and adjust the “End Date” so that the permit is only written for 14 days.
  - a. Always keep the start date the same
2. Email the traveler and let them know that although their trip is X amount of days, Bradley International only allows the Travel office to issue passes up to 14 days.
  - a. Example: Hi Traveler, I’m contacting you to inform you that although you requested a Bradley parking permit for your trip 6/1/2019 – 7/1/2019, Bradley International Airport only allows parking permits to be issued for up to a maximum of 14 days. Therefore, I will write your pass from 6/1/2019 – 6/14/2019. Parking for the remainder of the trip must be paid out-of-pocket and may be submitted for reimbursement to the Travel office. Please let me know if you have any questions.

***If the trip location is in North Carolina or Mississippi***

1. Email the traveler and inform them that since there is a travel ban to North Carolina or Mississippi, a Bradley permit cannot be issued because we cannot use State funds to pay for their travel.
2. Go into their Travel Webform and click “Finalize and Do Not Send Email.”

**For any condition, you cannot print out a pass until they are resolved.**

**If no boxes are highlighted in a particular row, then a Bradley pass can be printed for them without further investigation.**

**TO PRINT A BRADLEY PERMIT:**

After any issues have been resolved, or for any rows that do not have any boxes highlighted, you can go ahead and print out a pass for the traveler.

1. Obtain a booklet of parking passes from the desk drawer.
2. In the BDL Parking Pass Input Sheet Excel document in the yellow “Data” tab at the bottom, start from the top of the list of travelers and look at the ID number under column B. This is the ID number that corresponds to the ID number on the Webform.
3. Open up the Webform tab again on the Internet and look for that ID number. It will appear in the far left column of the Webform responses.

ID	Stage	Draft
2733	Pre Trip - Trav...	
3949	Pre Trip - Trav...	
5353	Pre Trip - Trav...	
5518	Pre Trip - Trav...	
5890	Pre Trip - Trav...	
5956	Pre Trip - Trav...	

- When you find the corresponding ID number, click on it.
- Confirm that you clicked on the correct ID number by making sure that name on the Webform matches to the name in the Excel document.
- Scroll all the way to the bottom of the Webform and make sure that "International Health Insurance" says "No." If it says "Yes," go back and make sure that you have already confirmed that this person has received international health insurance. If they have already been confirmed, then you can continue.
- If "International Health Insurance" says "No," or it says "Yes" and you have checked that they have already been processed for international health insurance, then check off "Bradley Parking Pass," and into the text box that just popped up, enter the red number of the next pass in the booklet of parking passes.
- Check off "Finalize & Send Email" and then "Finalize – Bradley" at the bottom of the page.

Travel Office Processing

Services Processed

Bradley Parking Pass

International Health Insurance

The traveler requested

- Bradley Parking Pass: **Yes**
- International Health Insurance: **No**

Permit Number

Select option to finalize all the travel services to complete the Pre-Trip processing.

Finalize & Send Email

Finalize & Do Not Send Email

I would like to withdraw this Travel WebForm

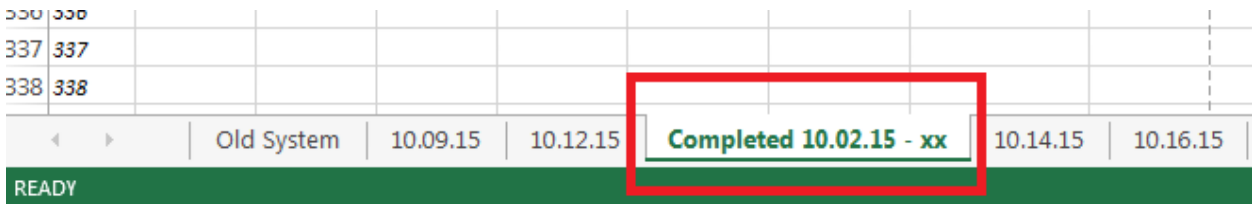
User	Stage	Time	Action
[Redacted]	Start Pre-Trip @	10/8/2015 14:25	Submitted

9. Return to the "Data" tab of the "BDL Parking Pass Input Sheet" Excel document and type in the same permit number of the pass under the "Permit Number" in column N corresponding to the traveler who is receiving it.
10. Look at the number in column A that corresponds to that same traveler's name.
11. Now click on the green "Input" tab of the "BDL Parking Pass Input Sheet" Excel document.
12. Type in the number from column A (from step 10) into the yellow box and press enter. The traveler's information should pop up. Confirm that this is correct.

	A	B	C
1	#	25	
2		T00	
3			
4			
5	DATE (Beg):	11/4/2014	
6	DATE (End):	11/20/2014	
7			
8	User Name:	Jacqueline	Hesse
9	State Agency:	UConn	
10	Travel Authorization #:	T00	

13. Open the front of the printer and put the parking pass in. Make sure the paper is pushed against the printer; otherwise it will not print correctly.
14. Now click the gray "Output" tab from the "BDL Parking Pass Input Sheet" Excel document. Make sure it is selected from A1 to F37.
15. Go to File → Print and make sure the Printer is "HP LaserJet P4014 UPD PCL 6." Under settings, click the first drop-down tab and select "Print Selection"
16. After you have printed all the passes for eligible travelers, open up the Excel document "Master List BDL Passes FY17" from the Q drive by going to AP → Travel → Bradley Passes → FY 2017. This is where all the completed and printed passes will be found. You should have two Excel files open.
17. Return to the yellow "Data" tab from the "BDL Parking Pass Input Sheet" excel document and copy everything from B2 to the last traveler's permit number in column N.
18. Go back to the Master List Excel sheet and paste starting in Column A.
19. Double check to make sure that the permit numbers listed in the Master List are in consecutive order.

20. Enter today's date under column O of "Date Processed" and your initials under column P titled "Processor Initials."
21. Once you've finished entering information into the Master List spreadsheet, copy all the entries from that day and also paste them into the document "Passes Log April 7, 2015", making sure that you're pasting into the most recent "Completed" tab.
  - a. In this document, make sure you paste the information starting in column B, and then dragging the numbers down from column A in order to number each line.



22. Make sure to save before closing out of the document.

#### TO MAIL A BRADLEY PERMIT:

##### **For Pickup:**

1. If the date they are leaving is within 5 **BUSINESS** days, enter "Pickup" into column N under the "Mailed/Pickup" box.
2. If the pass is to be picked up, staple it to a map and place it on the top of the front desk and email the traveler letting them know they need to come get it.
  - a. Example: Hi Traveler, The Bradley parking pass you requested for your trip to \_\_\_\_\_ is ready for pickup at the Travel office. We're open 8am-5pm Monday-Friday.

##### **To be mailed:**

1. If the trip is more than 5 business days away, enter "Mailed" into column N under the "Mailed/Pickup" box.
2. Check the initiator of each Webform in the tab that you labeled with today's date. *If the initiator is:*
  - a. *Mary Ryan:* change the U-box of the traveler to U-1173 and mail there
  - b. *Kim Gedney:* change the U-box to U-1078 and mail there
  - c. *Denise Day:* change the U-box of the traveler to U-3204 and mail there
3. *If the traveler is from UConn Storrs:* The U-box number will just say "UNIT \_\_\_\_." Staple the pass to a map and fold the paper in thirds and write the traveler's name as well as the U-box number directly on it and place it into the UConn Storrs mailbox near the door.

4. *If the traveler is from UConn Hartford, UConn Greater Hartford, UConn School of Law, or UConn School of Social Work, fold the map and pass in thirds and write the traveler's name and the corresponding address, city, state, and zip code directly on it. Put it into the UConn Hartford box.*
  
5. *If the traveler is from another UConn campus (including GBLC): Staple the pass to a map and put the pass and map inside a mailing envelope and write the address on the envelope. Place it on top of the mailing boxes so whoever picks up the mail knows it needs to be stamped.*

#### EMAILING TRAVELERS:

Email the traveler, but always cc the initiator of the Webform if they're not the traveler themselves.

Travelers must be notified if:

1. They need to pick up their parking permit
  - a. Will pick up if their departure date is within 5 business days or
  - b. In the post-trip notes of their Travel Webform, they indicated they will come pick it up (usually only Athletics will note this)
2. You changed their parking permit dates
  - a. Their Webform included personal days so you didn't include them in the permit dates
  - b. Their travel was over 14 days in duration
3. Their travel is to NC or MS

#### TO GET MORE PASSES:

1. When there are only 3 books of passes remaining, it's time to get more passes from Bradley.
2. Open the Excel document titled "Passes Log April 7, 2015" and rename the most current tab with an end date of yesterday so that it says "Completed 4.7.2019-yesterday's date." Then create a new tab and rename it starting with today's date so that it says "Completed today's date -."
3. Open a new Excel document
4. Copy ALL the information from the tab with yesterday's end date and paste it into the new Excel document and rename it "BDL Pass Request" with today's date.
5. Email [Jonathan.Galligan@uconn.edu](mailto:Jonathan.Galligan@uconn.edu) and attach the BDL Pass Request Excel document just created and let him know that more passes need to be requested.
6. Within a week, more BDL passes will be sent to us from Bradley International Airport.