# Project Fast Lane Improving Travel and Expense









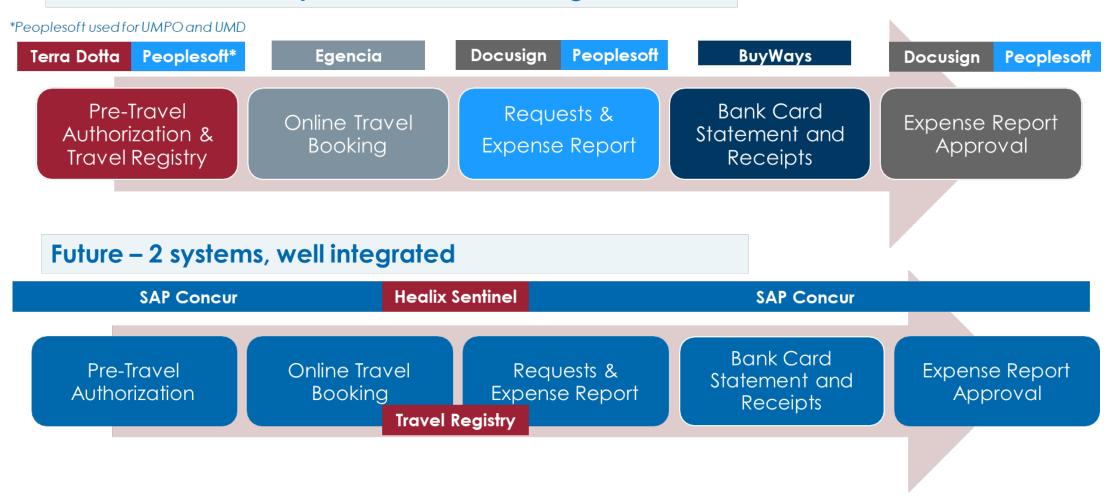
Rollout & Training Plan
December 2023

# Topics

- New Technology & Processes
- Campus Rollout Timeline
- Scheduling Approach
- Training Approach
- User Support
- Communication Plan
- Accessibility & Accommodations

# New Technology & Processes

#### Current – 5 different systems with limited integration



# Campus Rollout Timeline

Campus	Aug Se		Sept	O	ct N	ov		Dec	Jan		Feb		Mar		Apr		May
Amherst	Prep			Pilot (Large :			‡ of users)			Prep	All N Acad		½ Academic		Rest of Campus		
Boston	Prep		Pilot	Prep		Pilot	· Aca	demic		Prep	Addit Depar	tional tments			Rest of Campus		
Chan	Prep			Pilo			t			Prep	TBD TBD		TBD	Prep	Rest of Campus		
Dartmouth	Prep		Pilot	Prep	Pilot Academic			Prep	All N Acac		Rest of	of Campus					
Lowell	Prep		Pilot	Prep	Pilot Academic		etic 8 Servic	Admin es	Prep		College of ngineering		Prep	Rest of Campus			
UMPO	Prep		Pilot	Prep	UMPO												

Rollouts will occur between the 16<sup>th</sup> and 22<sup>nd</sup> of each month

# Rollout Scheduling Approach

Rollouts will occur between the 16<sup>th</sup> and 22<sup>nd</sup> of each month (due to Bank Cards)

#### **Pre-Rollout**

- Communication will start 2 weeks prior to rollout
- Training will start 1-2 weeks before the rollout date
- Orientation sessions will be scheduled for rollout week and the week prior

#### **During Rollout**

- Training schedule will ramp-up for during the rollout week and two weeks following
- User Communication will occur (at least) weekly

#### **Ongoing**

- Office Hours are every Monday and Wednesday from 3-4pm
- Support hotline and email is available throughout rollout

Our target is to migrate all employees by the end of April

# Training Approach

We will provide a variety of training options and supplemental resources

- Instructor-led training will be offered through Zoom, consisting of three courses:
  - Expense User creating expense reports and exception requests. Working with bank cards
  - Travel Booking Booking domestic and international travel, including pre-travel requests
  - Approver Approving expense reports and travel and exception requests
- Self-guided training will be provided as an alternative, highly accessible option
  - Delivered through Get Inclusive and optimized for accessibility tools
- Travel & Expense website contains
  - Condensed Course
  - Key information organized by topic (first day user guide)
  - Micro-training videos (with transcripts for accessibility)
  - Job Aids

# User Support

The Travel & Expense team has added new team members and has ample capacity to support new users with questions and issues.

Our main support channels are:

- Office Hours are available every Monday and Wednesday at 3 pm
- Concur Hotline: (774) 570-5507
  - Monday Friday from 8 am to 5 pm
- Send questions directly to: <u>travelexpense-services@umassp.edu</u>
  - Forms also available on the <u>rollout website</u>

### User Communication Plan

Comm #	Time	Communication Features
1	Week -2	What's coming, orientation and training schedule, T&E website
2	Week -1	Orientation and training schedule, T&E website
3	Week-1	Orientation summary, training schedule, what to expect next week
4	Week 1	Training schedule, self-guided training, T&E website
5 – Go Live	Week 1	Login information, support channels
6	Week 2	Micro-Resources - First Day User Training schedule, self-guided training, T&E website, support channels
7	Week 3	Micro-Resources – Mobile App, Setting Preferences Training schedule, self-guided training, T&E website, support channels
8	Week 4	Self-guided trainings, website, support channels

# Accessibility & Accommodations

#### We developed an **Equally Effective Alternative Access Plan**

 We met with your Workplace Accommodation lead (Susan Damato) to share this plan

Training resources have been calibrated for Accessibility

- Instructor led training
  - Instructors using descriptive language to support captioning
  - Materials available before session
- Self-guided training
  - Designed with accessibility at the forefront
- Micro resources
  - Available with transcripts

#### Accommodation request process

- Described on T&E website
- Communicated in emails, orientation sessions, and other touchpoints