Project Fast Lane
Improving Travel and Expense

Rollout & Training Plan
December 2023

University of Massachusetts
Amherst • Boston • Dartmouth • Lowell • Medical School • UMassOnline

CONFIDENTIAL-INTERNAL USE ONLY
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

*PeopleSoft used for UMPO and UMD

Terra Dotta | PeopleSoft*
---|---
Egencia | DocuSign | PeopleSoft | BuyWays | DocuSign | PeopleSoft

Pre-Travel Authorization & Travel Registry | Online Travel Booking | Requests & Expense Report | Bank Card Statement and Receipts | Expense Report Approval

Future – 2 systems, well integrated

SAP Concur | Healix Sentinel | SAP Concur

Pre-Travel Authorization | Online Travel Booking | Requests & Expense Report | Bank Card Statement and Receipts | Expense Report Approval

Travel Registry
### Campus Rollout Timeline

<table>
<thead>
<tr>
<th>Campus</th>
<th>Aug</th>
<th>Sept</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amherst</td>
<td>Prep</td>
<td>Prep</td>
<td>Prep</td>
<td>Pilot (Large # of users)</td>
<td>Prep</td>
<td>All Non-Academic</td>
<td>½ Academic</td>
<td>Rest of Campus</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Boston</td>
<td>Prep</td>
<td>Pilot</td>
<td>Prep</td>
<td>Pilot Academic</td>
<td>Prep</td>
<td>Additional Departments</td>
<td>Additional Departments</td>
<td>Rest of Campus</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chan</td>
<td>Prep</td>
<td>Prep</td>
<td>Prep</td>
<td>Pilot</td>
<td>Prep</td>
<td>TBD</td>
<td>TBD</td>
<td>Prep</td>
<td>Rest of Campus</td>
<td></td>
</tr>
<tr>
<td>Dartmouth</td>
<td>Prep</td>
<td>Pilot</td>
<td>Prep</td>
<td>Pilot Academic</td>
<td>Prep</td>
<td>All Non-Academic</td>
<td>Rest of Campus</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lowell</td>
<td>Prep</td>
<td>Pilot</td>
<td>Prep</td>
<td>Pilot Academic</td>
<td>Prep</td>
<td>Athletic &amp; Admin Services</td>
<td>College of Engineering</td>
<td>Rest of Campus</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UMPO</td>
<td>Prep</td>
<td>Pilot</td>
<td>Prep</td>
<td>UMPO</td>
<td>Prep</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Rollouts will occur between the 16\(^{th}\) and 22\(^{nd}\) of each month
Rollout Scheduling Approach

Rollouts will occur between the 16\textsuperscript{th} and 22\textsuperscript{nd} 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: travelexpense-services@umassp.edu
  - Forms also available on the rollout website
# User Communication Plan

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