

Project Fast Lane

Improving Travel and Expense



Information Sessions
June 2023



University of Massachusetts

Amherst • Boston • Dartmouth • Lowell • Medical School • UMassOnline

INTERNAL USE ONLY

Topics

Project Background

- Project Summary
- Project Timeline
- Project By the Numbers

Preview of Future Improvements

- Overall
- Expense Reports
- Travel

Ensuring a Smooth Transition

- Train, Transition, Support

Next Steps/Questions/Staying Connected

Project Background

Project Fast Lane – Improving Travel & Expense



The Current Way

- Complex processes
- Antiquated technology
- Time-consuming, slow

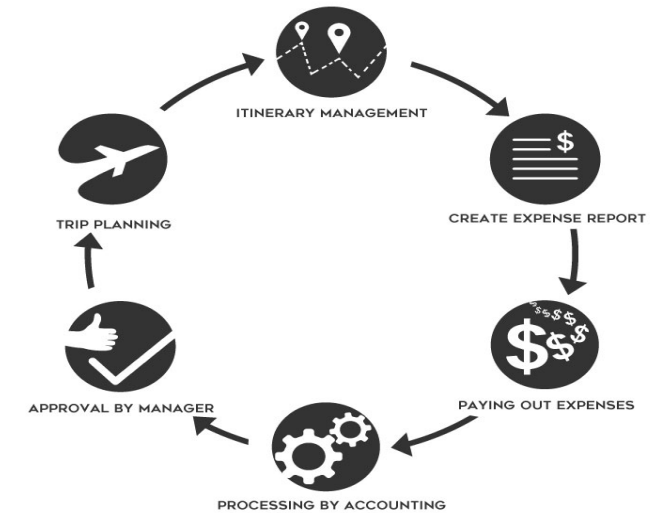


Project Fast Lane



The Improved Way

- Streamlined process
- Modern, integrated technology
- Efficient, “fast”

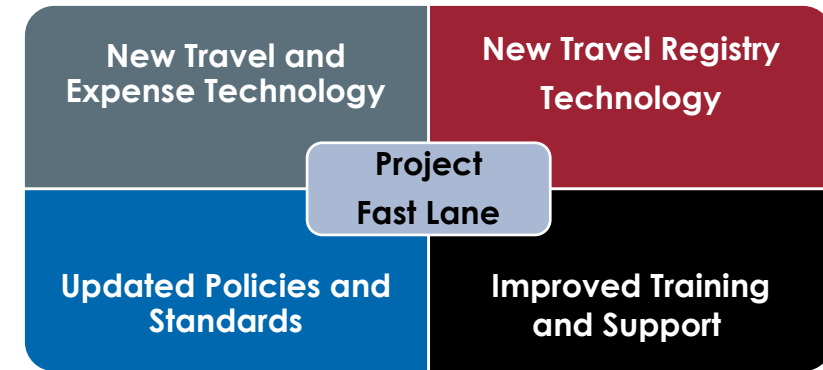


Project Fast Lane - Summary



Goal / Key Project Components

- Improve business & travel expense functions
- Update policies/standards, streamline processes, upgrade technology, enhance support
- Improve speed, efficiency, compliance



Campus Involvement

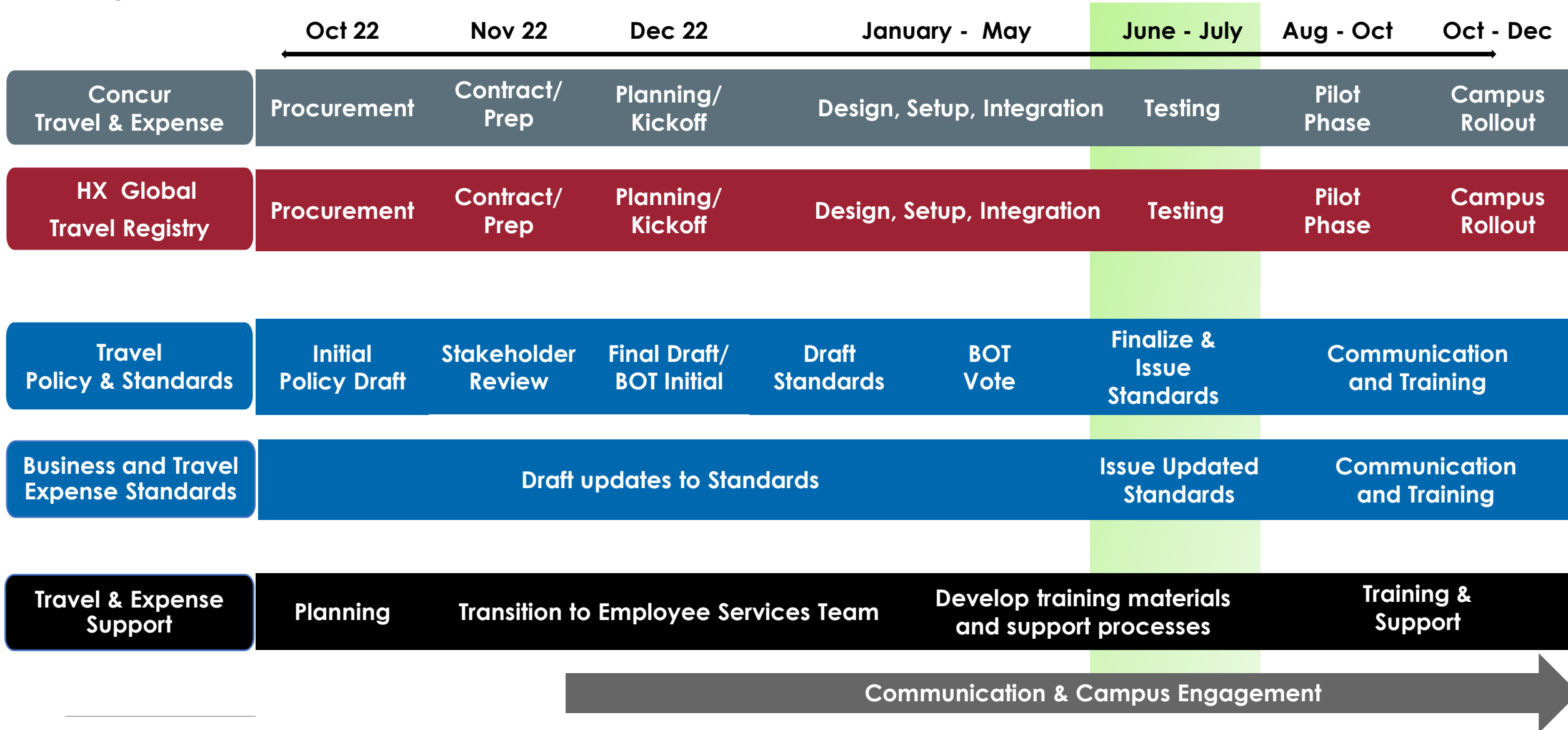
- System-wide Project Team(s) and Governance
- Focus Groups
- Employee/departmental input and feedback



Important Milestones

- **December 2022** – Project Fast Lane begins (policy/standards work underway)
- **April 2023** – Updated Travel Policy Board of Trustees vote
- **Summer 2023** – Pilot Phase Rollout
- **Fall 2023** – Campus Rollouts

Project Fast Lane - Timeline



INTERNAL USE ONLY

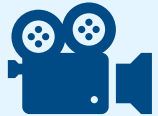
Project Fast Lane: By the Numbers



900 Project Plan Tasks



11 Integrations



55 Hours of Meeting Recordings



96 Focus Group Members



92 Design Decisions



86 Design Change Requests



170 Test Scenarios



174 Campus Questions Submitted

Preview of Future Improvements

Fewer Systems, Well Integrated

Current – 5 different systems with limited integration

**Peoplesoft used for UMPO and UMD*



Future – 2 systems, well integrated



Preview of Key Improvements – Overall



Mobile – Systems available via browser or mobile app



Accessible – Systems accessible to those using assistive technology



Secure – Systems accessed via single-sign on; data secure



Intuitive – Systems have modern look and feel, logical structure



System-wide & Campus Specific – Systems designed for consistency across campuses while accounting for campus specific requirements

Preview of Key Improvements – Expense Reports



Approvals – Setup based on employee’s campus and department
Visibility & automation notifications to approvals for requests and expense reports



Policy Integration – System is setup to notify users when there is a requirement based on UMass policy



Bank Card Integration – Automatic daily import of bank card transactions
Expenses included in Expense Report - Eliminate Buyways Requisition



Mileage Calculator– “Google Maps” like feature to calculate mileage
Includes ability to include/exclude normal commute and personal mileage



Digital Receipt Capture – Receipts can be uploaded directly into expense reports from a PC/laptop or mobile device



Cost Allocation – Expense items allocated directly to budgets
Includes sponsored and non-sponsored cost allocation

Preview of Key Improvements – Travel



Pre-Travel Authorization – Setup based on employee’s campus and travel destination; Visibility to approvals for pre-travel authorization



Policy Integration – Setup to notify users when there is a requirement based on UMass policy



Travel Booking – Book travel directly in Concur to access UMass discounts and automatically feed expense reports (not required)



Travel Registry – Travel booked in Concur is automatically registered. If travel is booked outside of Concur, travel can be registered by emailing the itinerary from a UMass email address



Risk Information – Improved traveler notifications regarding high-risk travel; Enhanced country information available to travelers

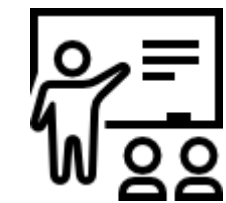
Ensuring a Smooth Transition

Transition Approach

Scope of impact across campuses

- In FY 23, approximately 9,000 employees across all campuses have in some way been involved in Travel and Expense (T&E)
 - Travel bookers, expense report creators, approvers, bank card users/holders
 - Frequent and infrequent use depending on role and campus

How do we ensure a successful transition for all users?



Train



Transition



Support

Train

Ensure all users are prepared for the transition

- Train users on new technology and related policies and standards
- Offer multiple training modes
- Align with campus processes for training and user access

Planned Training Resources



Instructor-led

- Virtual, instructor led sessions offered on a set schedule
- Role-based



Self-guided

- Pre-recorded, self-guided, self-paced training on demand
- Standard self-service and proxy user training



Resource Library

- Topic-specific videos and job aids

Transition

Pilot Phase – August 14 to October 6

- First group of users to transition to the new T&E processes
- Approximately 150-200 users from across all campuses
- Ensure all processes are working for all T&E scenarios
- Working with campuses to identify Pilot Phase participants

Campus Rollout Phase – Targeting no earlier than mid October

- After a successful pilot phase, we will transition all other T&E users
- Working with campuses to determine how to best approach the transition for each campus

Support

Resource Library

- Comprehensive resource library with videos and job aids for users to reference after training and transition

Support Structure

- Level 1 support (standard situations) offered by the President's Office Service and Quality Team
- Level 2 support (complex situations) offered by the President's Office Travel and Expense and Bank Card Teams
- Campus Controllers and Risk Management groups to be engaged for related policy or exception support needs

Next Steps

- Campus Information Sessions being scheduled
- Increased communication to campus users throughout the summer and into the fall
- Testing Phase continues through end of July
- Pilot Phase preparations underway/campus departments to be identified
- More information on campus rollouts coming this summer

Thank You! Questions?

Project Fast Lane



Stay Connected

<https://www.umassp.edu/projectfastlane>
email--David Nero, dnero@umassp.edu