Project Fast Lane
Improving Travel and Expense

Information Sessions
June 2023

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

Project Background
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  • 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

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

New Travel and Expense Technology
Updated Policies and Standards
Improved Training and Support
New Travel Registry Technology
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

Future – 2 systems, well integrated

*Peoplesoft used for UMPO and UMD

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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

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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

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Thank You!
Questions?

Stay Connected

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