

Project Fast Lane

Improving Travel and Expense



Rollout & Training Plan
December 2023



University of Massachusetts

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

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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*



Future – 2 systems, well integrated



Campus Rollout Timeline

Campus	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Amherst	Prep		Pilot (Large # of users)			Prep	All Non-Academic	½ Academic	Rest of Campus	
Boston	Prep	Pilot	Prep	Pilot Academic		Prep	Additional Departments	Additional Departments	Rest of Campus	
Chan	Prep		Pilot			Prep	TBD	TBD	Prep	Rest of Campus
Dartmouth	Prep	Pilot	Prep	Pilot Academic		Prep	All Non-Academic	Rest of Campus		
Lowell	Prep	Pilot	Prep	Pilot Academic	Athletic & Admin Services	Prep	College of Engineering	Prep	Rest of Campus	
UMPO	Prep	Pilot	Prep	UMPO						

- Rollouts will occur between the 16th and 22nd of each month

Rollout Scheduling Approach

Rollouts will occur between the 16th and 22nd 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

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