University of Florida
User Experience Feedback
Round 1
January 19th – 21st, 2022
AGENDA

- Housekeeping
- Project Background
- Key System Highlights
- Changes to Current Travel & PCard Processes
- User Experience Feedback Structure
- Scenarios
Housekeeping

• Technical issues – Use chat
• Questions and feedback are encouraged. Please remain on mute when not speaking
• Zoom chat feature is being monitored for questions and feedback
• Zoom reaction button is encouraged as appropriate
• Breakout Room
PROJECT BACKGROUND
Project Goal

To implement an integrated Travel and PCard system powered by Concur at the University of Florida.

Focusing on:
• End-user Experience
• Efficiencies
• Transparency/Compliance
It Starts with You...

- UF community listening tour
  - 32 units across campus

- Thank you for your help!
So Far...

• Selected Concur as the vendor
• Signed contract Fall 2021
• Project team has been working on building foundational system infrastructure
KEY SYSTEM HIGHLIGHTS
Key System Highlights

**MOBILE CAPABILITIES:**
Ability to submit a travel request and complete approvals on the go

**BOOKING TOOL:**
Includes saved traveler profile and e-receipts for major travel vendors (hotels, car rentals, and airlines)

**MOBILE RECEIPT UPLOAD:**
Reduce the need to collect, manage and store paper receipts

**DYNAMIC ITINERARY:**
Access to dynamic itinerary updates such as flight delays, gate changes, cancellations
Key System Highlights

**SINGLE PLATFORM:**
All travel charges and PCard charges exist in one place for ease of processing

**TRANSPARENCY:**
Increased visibility and reporting on travel and PCard spending

**COMPLIANCE:**
Built-in specific policies and alerts to help users complete allowable transactions per UF policies and directives

**ADDITIONAL TRAVEL TOOLS:**
Built-in foreign currency conversion and language translation tool, and automatic mileage calculator
CHANGES TO CURRENT TRAVEL & PCARD PROCESSES
Changes Round 1

CURRENT STATE

• Separate PCard and Travel & Expense modules in myUFL
• PCard transactions reconciled and approved on a per transaction basis
• Account code is entered as part of the ChartField for PCard transactions

FUTURE STATE

• Travel & PCard expenses in one system
• PCard transactions added to an Expense Report to reconcile and approve
• PCard & Travel will select expense types from a drop-down field category
New Terms Alert!

CURRENT TERMS
- Travel Authorization
- Expense Report
  used to refer in relation to travel or
general reimbursement transaction

FUTURE TERMS
- Travel Request
- Expense Report
  includes travel, general
reimbursement AND PCard
transactions
- Available Expenses
  PCard charges and e-receipts not
assigned to an expense report
USER EXPERIENCE FEEDBACK (UEF) ROUNDS
UEF Structure

• User Experience Feedback (UEF) is the opportunity to interact with a system in development and contribute to the design of the system to ensure the final product better meets the needs of the end user.

• Each round builds on the previous one, so we ask that you commit to all three rounds.

• UEF is not a training session.
Focus on the round’s main objective

Provide feedback! Complete the survey at the end of your scenarios

You are welcome to provide feedback to the members of our project team via chat
WHAT’S NEXT
Spring and Summer 2022

• UEF Rounds
  • Round 1: Look and Feel (Today!) – Introduce the environment and initial configuration of the Request, PCard Expense Report, and Travel Expense Report
  • Round 2: Workflow (February) – Review the system’s approval process and is it routing as it was intended based on the information entered
  • Round 3: System Rules (March) – Review rules in the system based on policies and directives and is the system appropriately capturing and flagging items out of policy

• Pilot
  • Several departments will be asked to participate
SCENARIOS
Today’s UEF Session

• Login to implementation site
  • https://implementation.concursolutions.com/
  • Login issues – Use chat

• The scenarios are self-lead and self-paced
  • Once you have finished with the scenarios, we ask that you complete the survey. The survey link is located at the end of your scenario handout and in the chat
  • When you are done, logout of the system and exit the Zoom session

Feel free to ask questions through the chat, it is monitored and we’re here to help!
After Today’s Session

• Your feedback is important! Please complete the survey and share your thoughts on the system and the session

• Be on the lookout for the invite for UEF round 2 & 3

• Additional questions? Email travel@ufl.edu