

UNIVERSITY *of* FLORIDA



TRAVEL & PCARD SYSTEM

**University of Florida  
User Experience Feedback  
Round 1**

**January 19<sup>th</sup> – 21<sup>st</sup>, 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

The screenshot displays the Concur user interface. At the top, there is a navigation bar with tabs for Home, Travel, Expense, Approvals, Invoice, Reporting, and App Center. Below this, the user's name 'Hello James' is shown next to the Concur logo. To the right, there are three quick action buttons: '+ Start a Report', '+ Payment Request', and '03 Open Reports'. The main content area is divided into two sections. On the left is the 'TRIP SEARCH' section, which includes a toggle for 'I'm booking for a guest', a row of travel mode icons (Flight, Rail, Car, Hotel, Rental, Bus, Clock), and a 'Flight / Rail Search' form. The form has radio buttons for 'Round Trip', 'One Way', and 'Multi-Segment'. It includes input fields for 'Departure City' and 'Arrival City', each with a 'Find an airport | Select multiple airports' link. A prominent orange 'Search' button is at the bottom of the form, with a 'Show More' link below it. At the very bottom of the search section, there is a text input field 'Or, tell us in your words what you want to do:' with a search icon. On the right side of the page, there is a promotional banner for mobile devices with the text 'Use your smart capture exper...' and a 'Downl...' button. Below the banner is the 'COMPANY NOTES' section, which contains text about a new partnership and the addition of Pacific Airways to the 2014 Airline program. At the bottom right, there is a 'MY TASKS' section with two summary cards: '16 Approvals Needed' with a right arrow and '09 Available Expenses'.

# KEY SYSTEM HIGHLIGHTS



# Key System Highlights



## **MOBILE CAPABILITIES:**

Ability to submit a travel request and complete approvals on the go



## **MOBILE RECEIPT UPLOAD:**

Reduce the need to collect, manage and store paper receipts



## **BOOKING TOOL:**

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



## **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

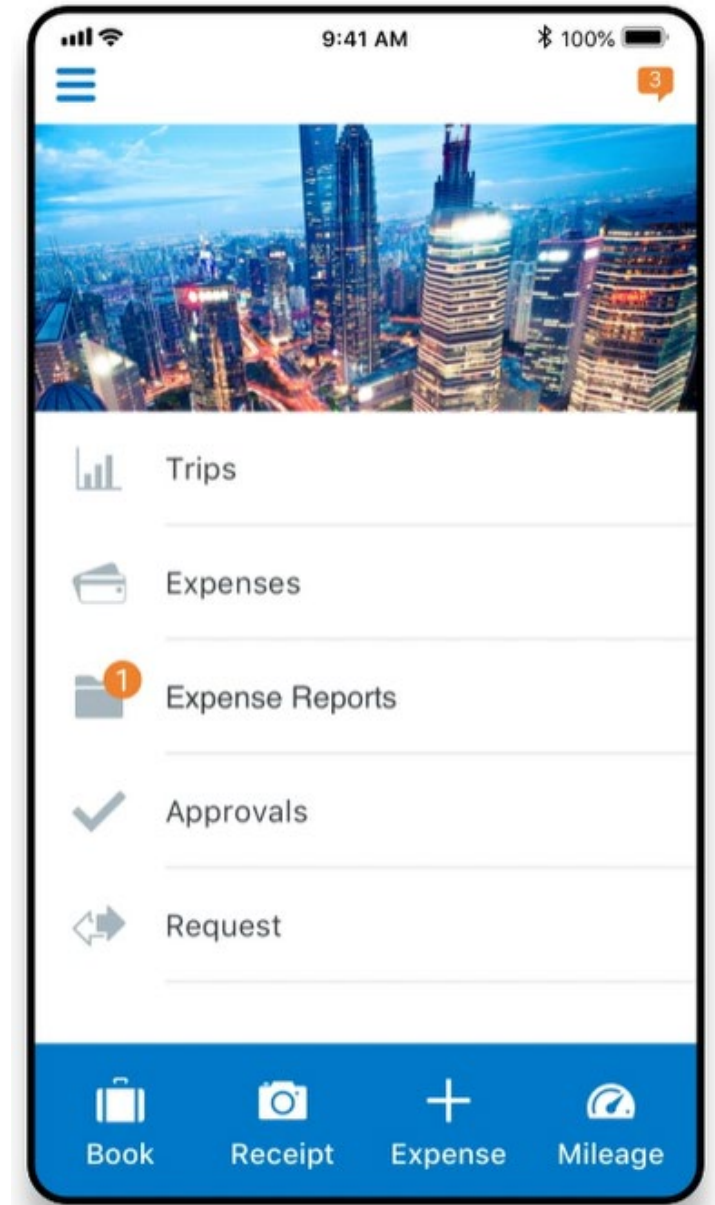
- User Experience Feedback (UEF) is the opportunity to interact with a system in development and contribute to the design of the system to ensure the final product better meets the needs of the end user
- Each round builds on the previous one, so we ask that you commit to all three rounds
- **UEF is not a training session**

# Your Mission

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 its 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 if the system appropriately captures and flags 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](mailto:travel@ufl.edu)

**INTELLIGENT TOOLS & APPS**

**QUESTIONS**

