

UNIVERSITY *of* FLORIDA



TRAVEL & PCARD SYSTEM

**University of Florida  
User Experience Feedback  
Round 3  
June 14<sup>th</sup> & 16<sup>th</sup>, 2022**

# AGENDA

- User Experience Feedback Structure
- New System Benefit
  - Air Card
- Audit Rules
- Scenarios

# **USER EXPERIENCE FEEDBACK (UEF) ROUNDS**

# REMINDER: UEF PURPOSE

- UEF is **not a training session**
- User Experience Feedback (UEF) is the opportunity to interact with a system in **development** and contribute to the configuration of the system
- Help verify the system is working accordingly
- This is our last anticipated round of UEF sessions

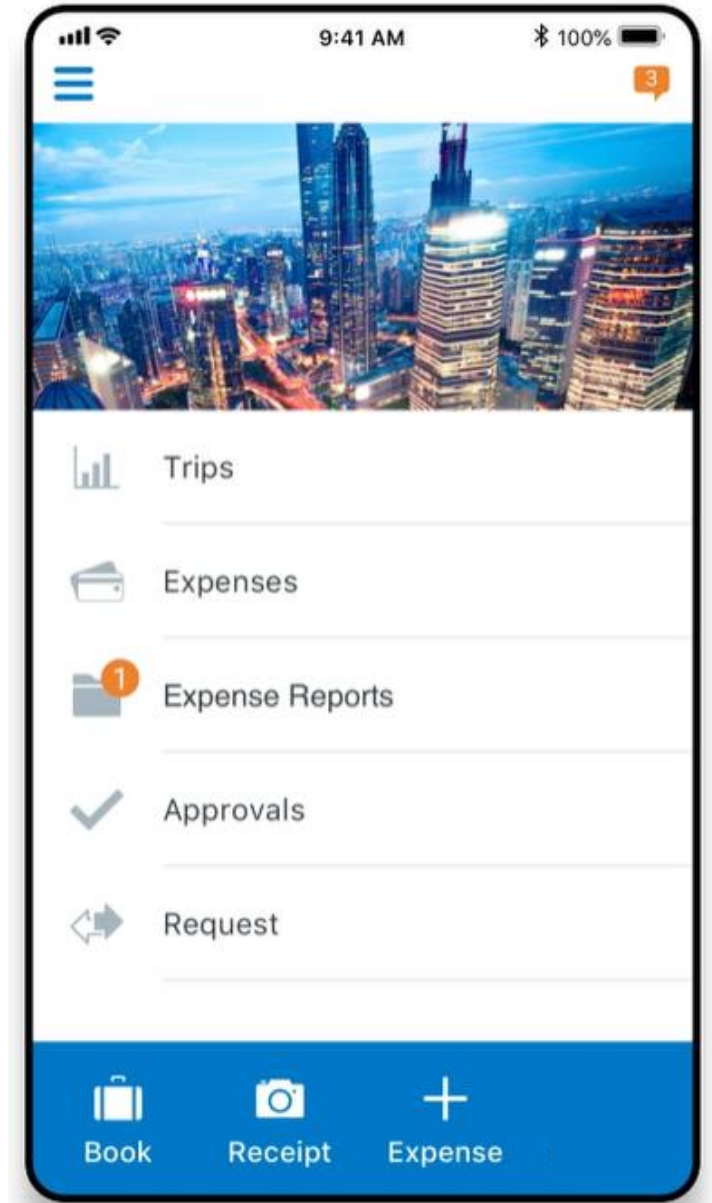
# COMPLETE THE MISSION

Focus on this round's main objective:

**System's audit rules and integrated alerts**

**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





# **NEW SYSTEM BENEFIT**

# KEY DECISION

Introduce a new payment method, the Air Card, with UF GO implementation





# UF AIR CARD: NEW PAYMENT OPTION


- Integrated within the UF GO Booking Tool (Travel). Considered a “ghost” or “lodge” card because a physical plastic card does not exist
- Can be used to pay for airfare and related expenses (e.g., agent fees) booked through the booking tool or directly with World Travel (UF’s travel management company)
- Charges will automatically load into "Available Expenses" in the UF GO Expense module for the traveler (UF GO user account)
- Transactions are reconciled by assigning them to and submitting a Travel Expense Report

# AUDIT RULES

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- Audit rules are configured in UF GO to help users remain in compliance with UF's policies and regulations
- If audit rule criteria is met on a Travel Request or Expense Report, an alert is triggered
- Audit alerts are notifications that something in a request or report requires attention and possible correction

# TYPES OF AUDIT ALERTS

Audit Alerts	Description
	<p>Hard Stop Rules:</p> <p>An action must be taken for the rule to be cleared and allow the Travel Request or Expense Report to be submitted</p>
	<p>Warning / Caution Rules:</p> <p>Warnings built in UF GO to help users stay in compliance with all applicable directives, polices, and regulations</p>

# EVENT ALERTS

Save vs. Submit	
Save	Submit
Immediate feedback on the entry of data	Evaluates the entire report

## Tip Alert!

If you corrected a hard stop alert and it remains visible after clicking Save, click the Submit button

# **ATTENTION: PATIENCE NEEDED**

The instructions on the scripts are purposefully written to have participants select incorrect options. This is necessary to test some of the audit rules and alerts configured in the system.

We thank you in advance for your cooperation.

# SCENARIOS

# TODAY'S UEF SCENARIOS

- Scenario # 1: Guest Domestic Travel Request
- Scenario # 2: International Travel Request
- Scenario # 3: PCard Only Expense Report
- Scenario # 4: Guest Travel Expense Report from Scenario #1
- Scenario # 5: Travel Expense Report from Scenario #2



# TODAY'S UEF SCENARIOS

- Login to implementation site
  - <https://implementation.concursolutions.com/>
  - Login issues – Use chat
  - Username: Your UF email address (e.g., Gatorlink@ufl.edu)
  - Use the SSO link
- The scenarios are self-lead and self-paced
  - Once you have finished with the scenarios, please complete the survey (link will be located at the end of your scenario handout and in the chat)
  - When you are done, log out 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!

# HOUSEKEEPING

- Reminder: UEF purpose – experience feedback, **not** training
- Technical issues – Use chat
- Questions and feedback about today's script are encouraged; please remain on mute when not speaking
- Zoom chat feature is being monitored for questions and feedback
- Breakout Room / Quiet Room

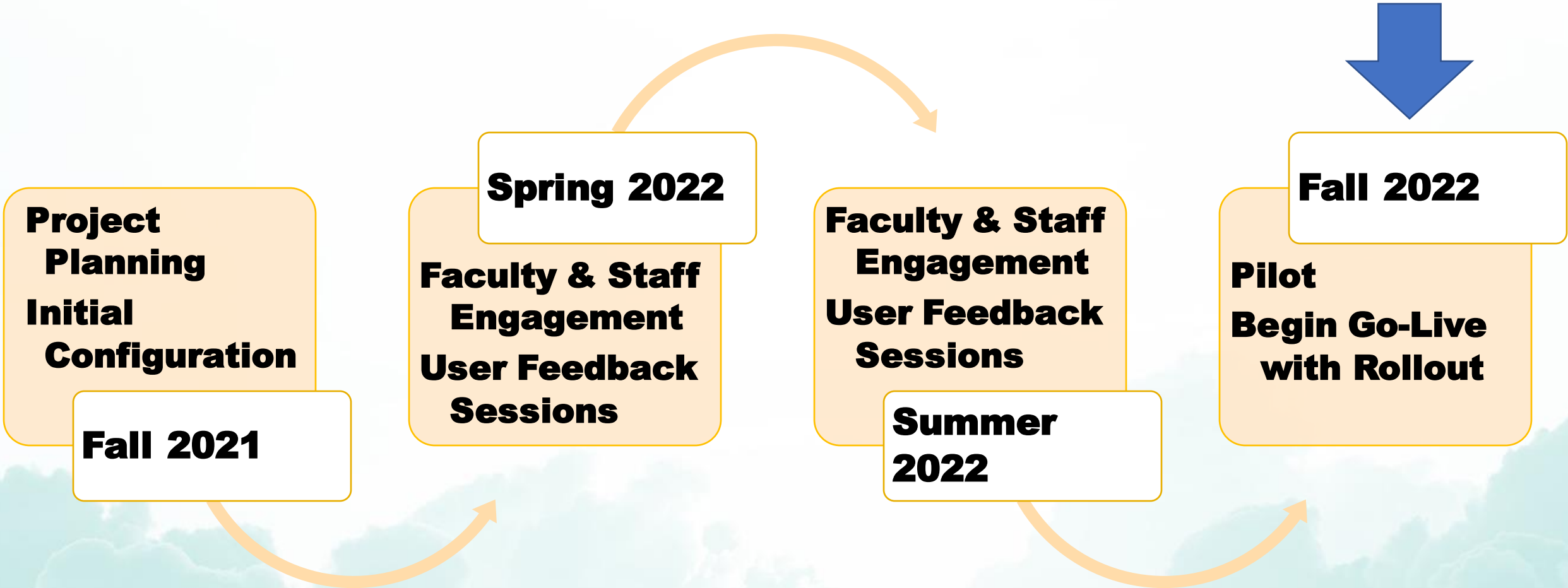
**WHAT'S NEXT**

## AFTER TODAY...

- **Your feedback is important!** Please complete the survey and share your thoughts on the system and the session
- Additional questions? Email [travel@ufl.edu](mailto:travel@ufl.edu)

**INTELLIGENT TOOLS & APPS**

# KEY MILESTONES



**QUESTIONS**

