ARCHIVUM TRAVEL

USF System

June, 2017

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What is Archivum?

- Archivum is a set of business applications developed by USF IT on the Appian BPM (Business Process Management) software, using the Agile methodology.
- Applications are in use or in development in USF Health, Student Success, Human Resources and the Controller's Office.
- See http://www.usf.edu/archivum for more information.

Archivum Travel Overview

- The new Travel application is called Archivum Travel, and is an improved way of managing Travel transactions at USF.
- Archivum Travel is a user interface with the PeopleSoft Travel Module, developed jointly by USF IT, USF Controller's Office and the software provider. Users interact directly with the Archivum Travel application to submit and approve travel authorizations, cash advances and expense reports.

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Intended Benefits

- Simpler, user friendly, streamlined experience for all users.
- Approvers are no longer required to log-on to the PeopleSoft ERP system to approve transactions.
- Full visibility of the status and location of transactions in the workflow.
- Capability to initiate, manage and approve transactions on mobile devices.

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Intended Benefits

- Increased awareness of compliance requirements built-in, eliminating the current separate, manual "Travel Compliance Form".
- Eliminate the "wallets" functionality used in PeopleSoft. Travel PCard charges are reconciled in the PCard Module and automatically loaded into the expense report by entering the Archivum Travel Request number when the charge is approved.

Intended Benefits

- Receipt capture via mobile device, upload, and linkage to a trip.
- Receipt images are attached to the expense report prior to submission, and therefore available to view by the approvers.
- Integration with DocuSign for expense report signature page requirements, accessed by USF faculty, staff and students using their USF NetID.
- Automatic budget checking.

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Intended Benefits

- Streamlined access set-up; no FAST security requests for approval role for supervisors and project managers. No change to FAST Travel workflow set-up for Expense managers, reviewers and RO approvers.
- Improved data collection and reporting for USF World and Export Control to manage their responsibilities pertaining to international travel. One example is multiple destinations vs. single "default location", another is emergency contact info.

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Intended Benefits

- Better management information via dashboards, reports and metrics which are not available in PeopleSoft.

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Other Implications

- Workflow order is changed to: 1) HR approval to travel, 2) automatic budget check, and 3) fiscal approval for funds availability.
- New option to submit a simplified Travel Request without cost estimates for HR supervisor approval to travel and later have cost and chartfield information added for the budget check and fiscal approval.

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Other Implications

- Receipts for travel-related PCard charges must be included in the PCard statement receipt package in addition to the travel expense report receipt package. This is because the charges are reconciled in the PCard module while approval is required on the expense report.
- Expense report will prompt for the last four digits of card number for expenses paid with personal credit card. This is for validation not paid with USF PCard.

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Other Implications

- Anticipated PCard charges are no longer encumbered via the Travel Authorization, since they are reconciled timely in the PCard Module, not later on the Expense Report.
- Post-Travel Authorizations (PTA's) are built into the system. All expense reports (except mileage-only) require an electronic authorization, including PTA's.

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Other Implications

- During transition, some Travel transactions will be in FAST and others will be in Archivum. The Expense Report will be completed in the system in which the Travel Authorization (FAST) or Travel Request (Archivum) is initiated and approved.

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Training

- Web-based training modules are being developed in partnership with IT, and will be posted on the Travel website for ready access.
- A prototype “Travel Request” has been posted for review.

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Timing

- Current Rollout Plan:
  - March – IT live on Travel Request
  - Mid-April – Pilot group live on Travel Request
  - May – IT live on Expense Report
  - Mid-June – Pilot group live on Expense Report
  - July – USF live on Travel Request (travel post-6/30 start)
  - TBD – USF live on Expense Report (for Travel Requests approved in Archivum)

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Pilot Group

- Conducting user testing.
- Live in production during pilot phases
- A big thanks to pilot participants:
  - Business and Finance
  - Muma College of Business
  - College of Marine Science
  - College of Public Health

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Resources

- Video training modules being developed:
  - Travel Request, Travel Request PTA
  - Approvals
  - Expense Report, Cash Advance
  - Travel PCard Charge Approval and TR Number Entry
- Archivum Travel web page with FAQ's, in development. http://www.usf.edu/business-finance/controller/payment-services/archivum.aspx
- Travel Manual and Checklist - to be updated
- Travel Helpdesk travelhelp@usf.edu
- IT Tech Support help@usf.edu

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Communications

- Communication Meetings with key groups
- Inside USF April 6, April 20, June 8
- Travel Listserv
- Travel Website
- University Controller's Office Website
- Internal Within Colleges and VP Areas
- Open communication meetings
- Stay tuned to Travel Listserv for further updates

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Demos – Draft Training Videos:

- Travel Request
- Approvals

- Note: Long-term log-in via MyUSF, not Appian Cloud as currently.

Questions?

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