



Shared Services Centers & BPI Update

December 1, 2015



Ben Lowenthal

What is New in the AAOU Shared Services Center?



Units Served by AAOU SSC

- Faculty Development Center
- Faculty Senate
- Office of Undergraduate Education
- Provost Office
- Student Support Services



Staff & Roles

AAOU Staff

- Associate Provost & Director, Nico Washington
- Assistant Director, Marrietta Downing
- Accountant, Jamie Jung
- Business Services Specialist, Krystle Purnell
- Business Services Specialist, TBD

AAOU Roles

- Accounts Payable
- Hiring
- Payroll
- Procurement
- Others (Financial Management, Foundation, JE's, Reporting)

AAOUSSC@umbc.edu
410-455-6755



Units Served by AAOU SSC

Faculty Development Center

Faculty Senate

Office of Undergraduate Education

Provost Office

Student Support Services



Staff & Roles

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AAOU Roles

- **Accounts Payable**
- **Hiring**
- **Payroll**
- **Procurement**
- **Others (Financial Management, Foundation, JE's, Reporting)**



AAOU RT Statistics

Resolved RT Requests (as of 10/20/2015)

	July	August	Sept	Oct	Totals
Accounts Payable	00	01	05	08	14
Payroll & Hiring	03	01	01	15	20
Procurement	02	00	00	00	02
Other	02	03	11	18	34
Totals	07	05	17	41	70



AAOU Lessons Learned

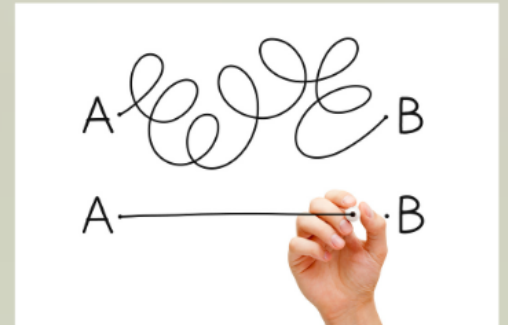
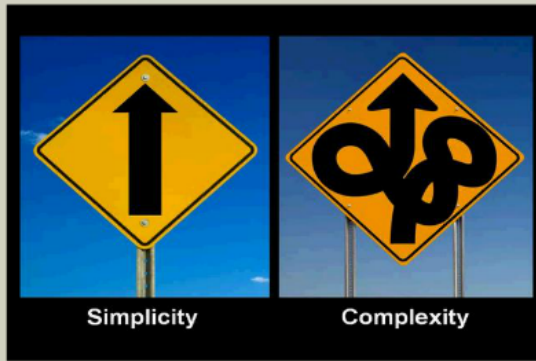
- Careful not to underestimate transition **prep time**
- Understanding the Units **internal business processes**
- Reducing **complexity** that exists within the Units
- Creating a **common knowledge** base across Units
- Continuous **change management** and **communication**
- Managing **expectations** both within Units and within SSC's
- Emphasizing the importance of completing the **survey**



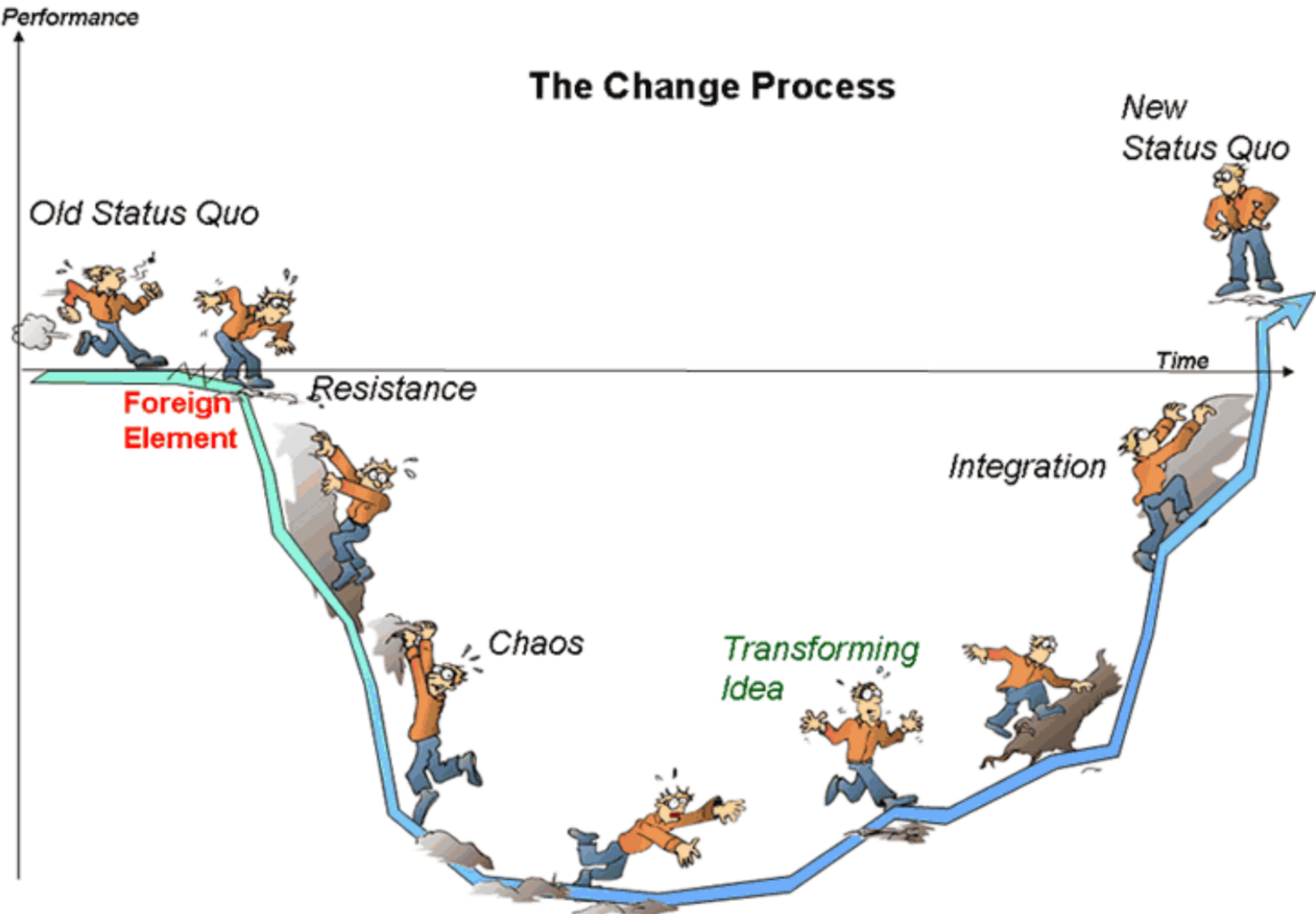
Internal Business Process



Complexity



The Change Process



Communication



What is new in the CNMS Shared Services Center?

CNMS Payroll & Hiring Staff

- Shirley Chao
- Jane Henderson

CNMS Procurement Staff

- Creighton Smith
- Mike Swierczewski

CNMS RT Statistics

Resolved RT Requests (as of 10/20/2015)

	<i>July</i>	<i>August</i>	<i>Sept</i>	<i>Oct</i>	<i>Totals</i>
Payroll & Hiring	37	32	41	23	133
Procurement	12	21	26	13	72
Totals	49	53	67	36	205

TAP Update



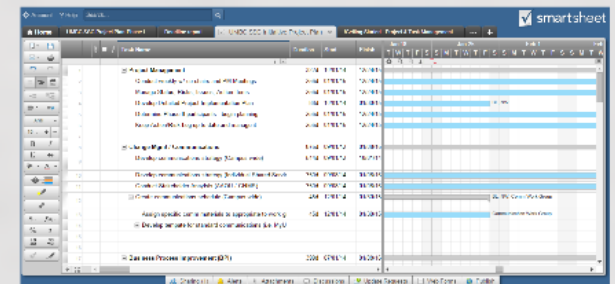
Toolkit for Administrative Professionals

New Features Added

- ***Eight new pages added including:***
 - *Payroll additions (will continue to add more)*
 - *In direct response to comments at the last Town Hall, a new section was added for General Accounting.*
 - *"Contact Us" page for central office contacts.*
- ***In response to TAP comments, added section on what Approval Authorities need to do to approve travel.***
- ***Working on videos to be added to the site.***

Phase II Update

- Who is next? Decisions coming soon. We will share as soon as they are made.
- Business Process Improvements - drill to detailed processes in central offices.
- Work Group setups - Stakeholders and Advisory Council
- Smartsheet - Project Management



U Advisory

Account ? Help Search...

smartsheet

Home UMBC SSC Project Plan-Phase I Deadline report UMBC SSC Initiative Project Plan x !Getting Started - Project & Task Management ... +

Task Name	Duration	Start	Finish	Jan 18							Jan 25							Feb 1							Feb						
				T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W					
Project Management	322d	10/01/14	12/24/15	[Gantt bars for Project Management tasks]																											
Conduct weekly w/ co-chairs and PM Meetings	256d	01/01/15	12/24/15	[Gantt bar]																											
Manage Status, Risks, Issues, Action Items	256d	01/01/15	12/24/15	[Gantt bar]																											
Develop Detailed Project Implementation Plan	88d	10/01/14	01/30/15	[Gantt bar with BL, NW]																											
Determine Phase II participants - begin planning	256d	01/01/15	12/24/15	[Gantt bar]																											
Keep Action/Risk Log up to date and manage it	256d	01/01/15	12/24/15	[Gantt bar]																											
Change Mgmt / Communications	876d	09/01/12	01/08/16	[Gantt bars for Change Mgmt / Communications tasks]																											
Develop communications strategy (Campus wide)	544d	09/01/12	10/01/14	[Gantt bar]																											
Develop communications strategy (Individual Shared Servic	350d	09/08/14	01/08/16	[Gantt bar]																											
Conduct Stakeholder Anaylsis (AAOU / CNMS)	350d	09/08/14	01/08/16	[Gantt bar]																											
Create communications schedule (Campus wide)	45d	12/01/14	01/30/15	[Gantt bar with BL, NW, Comm Work Group]																											
Assign specific comm materials to appropriate to work g	45d	12/01/14	01/30/15	[Gantt bar with Communication Work Group]																											
Develop tempate for standard communications (i.e. MyU				[Gantt bar]																											
Business Process Improvement (BPI)	399d	07/01/14	01/08/16	[Gantt bars for Business Process Improvement tasks]																											

Sharing (1) Alerts Attachments Discussions Update Requests Web Forms Publish

BPI Update

- Payroll & Hiring - Working with DoIT on Mass Contracts and Change PAR efficiencies
- Accounts Payable - eTravel Phase II coming soon
- Followed by workflow for working fund
- Procurement - PO Notification rolled out!
- DocuSign has been purchased. Will streamline many processes by adding electronic signature capabilities
- Address internal processes prior to automation

Training & Documentation

Workgroup Membership

- Bridget Stone
- Eva Valentine
- Gina Fischer
- Linda Rothfus
- Mae Golden
- Mildred Homa
- Nico Washington
- Trina Torkildsen

Training & Documentation Planning

Prereq

Training & Documentation Curriculum - Prerequisites													
Audience	Event	Lessons	Modality						Status	Additional information	Links		
			ILT	EL	QNG	Web	chk/	st/				min	Tip
All PS Users SSC	PeopleSoft Overview							x	PPT		Exists	This course is a prerequisite for many PS courses, including people using SA so should be comprehensive and not just focused on the SSC implementation. This should be e-learning with supporting documentation. The PPT used to create the e-learning can be the guide.	
	What is a relational database?										x	update	
	How do the various UMBC systems interact?											update	This needs to be updated to include the SA system, state systems, grant reporting, rex, r25, etc.
	PeopleSoft finance - what transactions does the end user do											update	create requisitions; reports; etc.
	PeopleSoft HR - what transactions does the end user do											update	PAR changes; statement of payroll charges report; OBEA/RETR; payroll; view employee history; etc.
	PeopleSoft SA - what transactions does the end user do											create	advising; class scheduling; permissions; grading; registration; degree audits; transfer credits; class rosters; etc.
	What is a Chartfield string?											update	Intro to PS_ Why
	Breakdown of the UMBC Chartfield string							x	x			update	Intro to PS_ Why
	Account Tree							x	x			create	tip - how to access it

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Shared Services Centers at UMBC



Shared Services Centers at UMBC

Institutional Group · 249 people

Notifications: All Updates

- Home
- Posts
- Events
- Files
- People
- Settings
- Promotions

PINNED ITEMS (most recently pinned first)



OCT 27 [Shared Services Center Town Hall](#)
 Progress and impact of our first two SSCs
10:00 AM · University Center : 312
 Shared Services Centers (SSC) Town Hall Meeting, October 27, UC 312 10AM CNMS & AAOU SSCs – Continuing Developments – Phase I Phase II moving forward Join us at our next Town Hall to...

paw 1 · 6 attendees · 0 comments

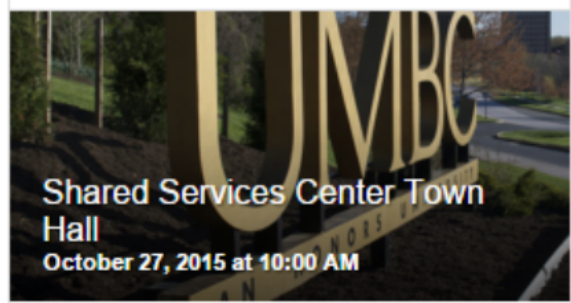


JUL 22 [Shared Services Town Hall](#)
 Go-live! Updates on TAP website and Phase I Centers
10:00 AM · University Center : 312
 Milestone Reached! SSCs Live! Join us at our next Town Hall to celebrate the milestone of establishment of our Phase I centers in AAOU & CNMS! President Hrabowski, Provost Rous and...

paw 1 · 10 attendees · 0 comments

- New Post
- New Event

Events



Shared Services Center Town Hall
October 27, 2015 at 10:00 AM

OCT 27 [Shared Services Center Town Hall](#)
10:00 AM · University Center : 312

Communication and Feedback

- Commitment to monthly updates on the myUMBC Group
- TAP feedback



I want to commend you for the effort and the results you have put forth on the TAP Website. While I know it's still evolving, it has become my "go to" site for information and on almost every visit I have found my answer quickly and accurately.

Thanks for creating the site and making my job so much easier.

Marsha Velli - Accounting Associate
UMBC Imaging Research Center

- All surveys completed rate service levels as "Very Good" or "Excellent"

Q & A





BPI

SSCs

TAP

Toolkit for Administrative Professionals



AAOU Shared Services Center

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 1000 University Ave
 Suite 1000
 Tallahassee, FL 32310
 Phone: 904.438.4755
 Fax: 904.438.4756
 Email: sharedservices@aaou.edu

AAOU RT Statistics
 Reached RT Requests (as of 10/20/2015)

	July	August	Great Call	Total
Accounts Payable	00	02	05	05
Payroll Billing	02	01	01	04
Programmer #	02	00	00	02
Labors	02	05	11	18
Total	07	08	17	32

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AAOU SSC

AAOUSSC@aaou.edu
 408-402-4755

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