

Shared Services Centers
Town Hall
February 24, 2016

*Jacinta Kelly
Ben Lowenthal
Nico Washington*





TAP Update
New Pages Added

- Health Management
- Vendor Profiles
- Learning Services
- Self-Registration
- Hiring New Staff (N/A)
- Academic Developmental Support

Communication
 Newsletter!
 Pick up a copy on your way out

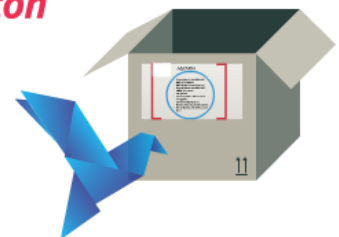
CNMS SSC - What's New?
 Jacinta Kelly

More Lessons Learned From the AAOU SSC Implementation

- Contract Change
- Sharing Best Practices
- Staffing
- Understanding of and Support for
- Quality of Service

AAOU SSC - What's New?

*Jacinta Kelly
 Ben Lowenthal
 Nico Washington*



**Shared Services Centers
 Town Hall
 February 24, 2016**

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Ben Lowenthal

Nico Washington



AGENDA

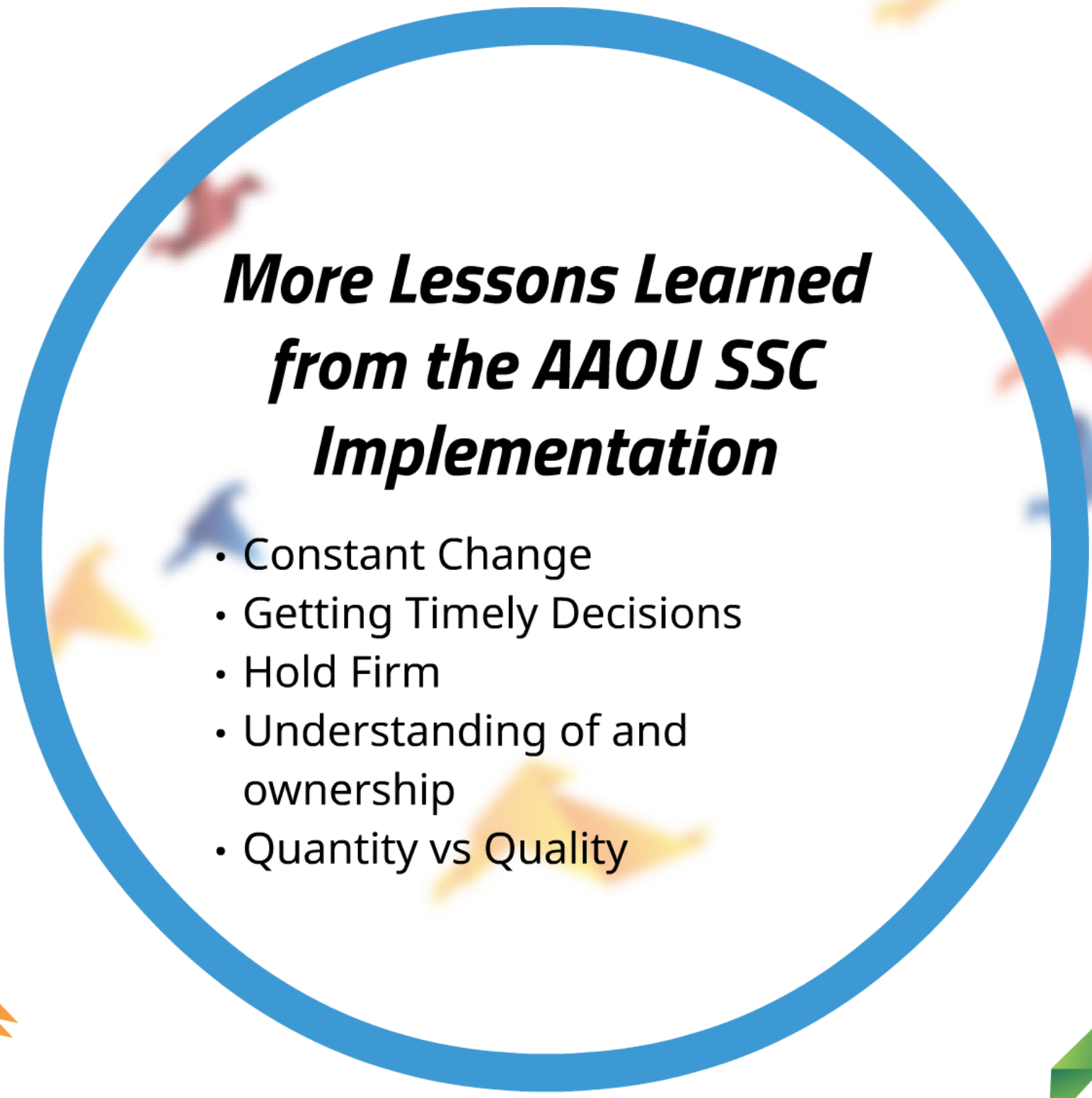
- ***What is New in the AAOU SSC?***
- ***AAOU RT Statistics***
- ***AAOU Addt'l. Lessons Learned***
- ***What is New in the CNMS SSC?***
- ***CNMS RT Statistics***
- ***TAP Update***
- ***Phase II Update - Who is Next?***
- ***BPI Update***
- ***E-travel Workflow Demo***
- ***Training & Documentation Update***
- ***Shared Services Panel Discussion***
- ***Q & A***

AAOU SSC - What's New?

Updated RT Statistics

AAOU Shared Services Center								
Resolved RT Requests as of (1/31/2016)								
	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	Jan-16	Totals
AAOU-Shared-Service-Center	0	0	5	9	27	8	8	57
AAOU-Shared-Service-Center-JE	0	0	0	0	1	1	0	2
AAOU-Shared-Service-Center-McNair	0	0	0	3	2	2	6	13
AAOU-Shared-Service-Center-OUE	0	2	2	6	10	2	1	23
AAOU-Shared-Service-Center-POO	1	8	9	8	3	1	0	30
AAOU-Shared-Service-Center-POS	0	1	4	1	1	2	2	11
AAOU-Shared-Service-Center-SDS	0	0	0	35	20	14	21	90
	1	11	20	62	64	30	38	226

1 11 20 62 64 30 38 226



More Lessons Learned from the AAOU SSC Implementation

- Constant Change
- Getting Timely Decisions
- Hold Firm
- Understanding of and ownership
- Quantity vs Quality

CNMS SSC - What's New?

Jacinta Kelly

CNMS Updated RT Statistics

CNMS Shared Services

Resolved RT Requests* (as of 6/30/2018)

*A single RT request may include actions for multiple people.

	Jul 15	Aug 15	Sep 15	Oct 15	Nov 15	Dec 15	Jan 16	Totals
Physical and Wiring	37	33	41	33	36	32	37	249
Personnel	3	11	26	26	23	18	23	150
Totals	40	53	67	65	53	49	60	404

Service Results (as of 6/30/2018)

	Accuracy	Timeliness	Level of Service
Incident	97.8%	91.8%	96.7%
Work Order	1.2%	4.2%	3.3%
Average	1.8%	0.8%	1.8%

CNMS Shared Services

Resolved RT Requests* (as of 1/31/2016)

*A single RT request may include actions for multiple people.

	<i>Jul-15</i>	<i>Aug-15</i>	<i>Sep-15</i>	<i>Oct-15</i>	<i>Nov-15</i>	<i>Dec-15</i>	<i>Jan-16</i>	<i>Totals</i>
Payroll and Hiring	37	32	41	39	38	50	37	274
Procurement	12	21	26	26	15	18	12	130
Totals	49	53	67	65	53	68	49	404

Survey Results (as of 1/31/2016)

	<i>Accuracy</i>	<i>Timeliness</i>	<i>Level of Service</i>
Excellent	97.0%	95.0%	94.7%
Very Good	1.2%	4.2%	3.5%
Good	1.8%	0.8%	1.8%

CNMS Shared Services

Resolved RT Requests* (as of 1/31/2016)

*A single RT request may include actions for multiple people.

	<i>Jul-15</i>	<i>Aug-15</i>	<i>Sep-15</i>	<i>Oct-15</i>	<i>Nov-15</i>	<i>Dec-15</i>	<i>Jan-16</i>	<i>Totals</i>
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Excellent	97.0%	95.0%	94.7%
Very Good	1.2%	4.2%	3.5%
Good	1.8%	0.8%	1.8%



TAP Update

New Pages Added

- Position Management
- Vacant Positions
- Starting Salaries
- Background Checks
- Hiring New Staff FAQ's
- Awarding Departmental Scholarships

Communication

Newsletter !

Pick up a copy on your way out!

Phase II

Who is Next?

- ***College of Engineering & Information Technology (COEIT)***

Dr. Julia Ross

- ***Student Affairs***

Trisha Wells

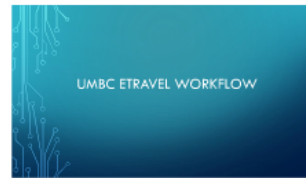
BPI Update

ERP Planning Committee Report

E-travel Workflow Demo!



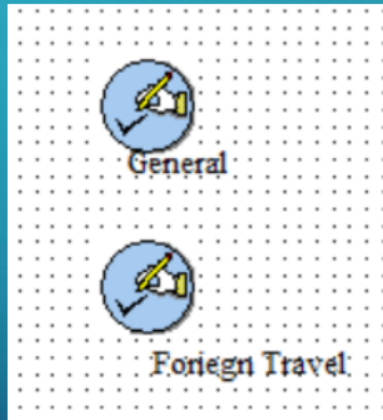
Stacy Long
Tony Finneran
DoIT





UMBC ETRAVEL WORKFLOW

ETRAVEL ROUTING APPROVAL STEPS



- General – Mandatory for all forms
- Foreign Travel – Triggered for account = 7040330

Trigger Workflow Process

Favorites | Main Menu > Accounts Payable > AP/Travel Forms > UMBC E-Travel Request Form


UMBC E-Travel Request Form

UMBC E-Travel Request Form

[Additional E-Travel Information & Instructions](#)

Search your completed travel requests

If this is a supplemental, mark "Yes": * Yes Associated Travel Request Number: 60105

 Triggers WF Process

Note: All fields denoted with a "*" are required.

This travel request is supplemental to TR#: 60105

Travel Agency: * Other

Department: * 10145

Last Name: * MARTEN First Name: * MARK

Is the traveler an employee? * Yes

DISTRIBUTION OF CHARGES

FUND *	DEPT *	P-FIN *	ACCOUNT *	PROJECT	ACTIVITY
1253 <input type="button" value="v"/>	10145 <input type="button" value="search"/>	022 <input type="button" value="v"/>	7040300 - Out-of-State/Routine Operati <input type="button" value="v"/>	<input type="button" value="search"/>	

ETRAVEL WORKFLOW INITIALIZATION



EMAIL

Confirmation Email To Submitter

Notification Email To All General Approvers



WORKLIST

Worklist Entry Created For All General Approvers



APPROVAL RECORD

Approval Record Created For Etravel Form

ETRAVEL GENERAL APPROVER SECURITY

APPROVAL ROLE

favorites | Main Menu > PeopleTools > Security > User Profiles > User Profiles

User Route Control Profiles

Role Name: UM_WF_ETRAVEL_GENERAL_APPROVAL

User Route Control Profiles	Personalize	Find	1 of 1	First	Last
Route Control Profile					
Department Table All					

OK Cancel

WF DEPARTMENT SECURITY

favorites | Main Menu > Accounts Payable > AP/Travel Forms > Workflow Department Security

WF Security

User: SLONG

Scroll Area Find | View All First 1 of 2 Last

*Tree SetID: SHARE Workflow Form Number 1 ETRAVEL

*Tree Name: CC_DEPARTMENT

Scroll Area Find | View All First 1-2 of 2 Last

*Department	Description	
10011	American Studies	
10145	Chem.Biochem & Enviro Eng-CBEE	



CONFIRMATION EMAIL TO SUBMITTER

Etravel Workflow Process Initiated



Inbox x



UMBC-FINANCE@umbc.edu

10:25 AM (0 minutes ago) ☆



to me ▾

The UMBC Etravel Workflow Process had been initiated for form number = 60105 You may monitor approval by navigating to Accounts Payable > AP/Travel Forms > Etravel Approval and clicking on Etravel Approval History hyperlink at bottom of page.



NOTIFICATION EMAIL TO GENERAL APPROVERS

UMBC ETravel form ready for approval



Inbox x



UMBC-FINANCE@umbc.edu

10:25 AM (2 minutes ago)



to me ▾

UMBC ETravel Id = 60105 form ready for approval.

ETravel Form can be approved from your worklist.

<https://fsdb4-web.ps.umbc.edu/WebAuth/workList>

Automated Email, Do Not Reply



WORKLIST ENTRY CREATED FOR GENERAL APPROVERS

Favorites | Main Menu > Worklist > Worklist

Worklist

Worklist for SLONG: Stacy Long

[Detail View](#) [Publish as Feed](#) Worklist Filters Feed ▾

Worklist Items						Personalize Find View All First 1 of 1 Last	
From	Date From	Work Item	Worked By Activity	Priority	Link		
Denise Kedzierski	02/03/2016	Etravel General Approval WL	eTRAVEL Approval	<input type="text"/>	535_UMBC1_60105	<input type="button" value="Mark Worked"/>	<input type="button" value="Reassign"/>



APPROVAL RECORD

*Approval Action:	Approve	▼
	Approve	
Approver Comments	Deny	

Travel Request Approval

Travel Request Number: 60105	Business Unit: UMBC1
*Approval Action: <input type="button" value="Approve"/>	Approval Status:

Approver Comments

Traveler

Agency: Other	Department: 10145	Chem.Biochem & Enviro Eng-CBEE
First Name: MARK	Last Name: MARTEN	

Distribution Of Charges

Fund: 1253	Curr Restr Sponsored Self Supp	Dept: 10145	Chem.Biochem & Enviro Eng-CBEE
P-Fin: 022	Research - Individual	Account: 7040330	Travel - Foreign
Project: 00007492	Engineering Protein Transport	Activity: BUD001	

Costs

Air/Rail/Bus: 474.60	Air?: Y Rail?: N	Reimbursable Expenses: 1364.00
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Airline

Airline: AirTran	Other: <input type="text"/>
Sponsored Funds: <input type="text"/>	

Travel

Departure Date: 03/12/2013	Return Date: 03/17/2013
Origin: BWI	Destination: California
Purpose: Attend Bi-Annual Fungal Genetics Conference	

Etravel Approval | [Etravel Approval History](#)

APPROVAL WORKLIST HISTORY

Favorites | Main Menu > Accounts Payable > AP/Travel Forms > Etravel Approval New Wi

Travel Request Number 60105

Business Unit UMBC1 **Approval Status** In Process

Personalize Find View All First 1 of 1 Last						
Workflow Step	Approver ID	Originator OperID	Approver Notified	Approver Reviewed	Approval Action	
1 Etravel General Approval	SLONG	KEDZIERS	02/14/16 9:23:56PM			+ -

ETRAVEL APPROVAL INCLUDING FOREIGN TRAVEL



EMAIL

Notification Email To All Foreign Travel
Approvers



WORKLIST

Worklist Entry Created For All Foreign
Travel Approvers

ETRAVEL FOREIGN TRAVEL APPROVER SECURITY

APPROVAL ROLE

Favorites | Main Menu > PeopleTools > Security > User Profiles > User Profiles

User Route Control Profiles

Role Name: UM_WF_ETRAVEL_FOREIGN_APPROVAL

User Route Control Profiles	
Route Control Profile	
Department Table All	+
FOREIGN_ACCOUNT	+

OK Cancel

WF DEPARTMENT SECURITY

Favorites | Main Menu > Accounts Payable > AP/Travel Forms > Workflow Department Security

WF Security

User: KIRBY

***Tree SetID:** SHARE **Workflow Form Number:** 1 **ETRAVEL**

***Tree Name:** CC_DEPARTMENT

***Department:** 10145 **Description:** Chem.Biochem & Enviro Eng-CBEE



NOTIFICATION EMAIL TO FOREIGN TRAVEL APPROVERS

UMBC ETravel form ready for foreign travel approval



Inbox x



UMBC-FINANCE@umbc.edu

3:26 PM (0 minutes ago)



to me, tonyfinneran

UMBC ETravel Id = 60105 form ready for foreign travel approval.

ETravel Form can be approved from your worklist.

<https://fsdb4-web.ps.umbc.edu/WebAuth/workList>

Automated Email, Do Not Reply



WORKLIST ENTRY CREATED FOR FOREIGN TRAVEL APPROVERS

Favorites | Main Menu > Worklist > Worklist

Worklist

Worklist for KIRBY: Joseph W Kirby

[Detail View](#) Worklist Filters Feed ▾

Worklist Items						Personalize	Find	View All		First	1 of 1	Last
From	Date From	Work Item	Worked By Activity	Priority	Link							
Stacy Long	02/03/2016	Etravel Foreign Approval WL	eTRAVEL Approval	<input type="text"/>	535_UMBC1_60105	<input type="button" value="Mark Worked"/>	<input type="button" value="Reassign"/>					



APPROVAL RECORD

*Approval Action:	Approve	▼
	Approve	
Approver Comments	Deny	

Travel Request Approval

Travel Request Number: 60105	Business Unit: UMBC1
*Approval Action: Approve ▼	Approval Status:

Approver Comments

Traveler

Agency: Other	Department: 10145	Chem.Biochem & Enviro Eng-CBEE
First Name: MARK	Last Name: MARTEN	

Distribution Of Charges

Fund: 1253	Curr Restr Sponsored Self Supp	Dept: 10145	Chem.Biochem & Enviro Eng-CBEE
P-Fin: 022	Research - Individual	Account: 7040330	Travel - Foreign
Project: 00007492	Engineering Protein Transport	Activity: BUD001	

Costs

Air/Rail/Bus: 474.60	Air?: Y Rail?: N	Reimbursable Expenses: 1364.00
----------------------	------------------	--------------------------------

Airline

Airline: AirTran	Other: <input type="text"/>
Sponsored Funds: <input type="text"/>	

Travel

Departure Date: 03/12/2013	Return Date: 03/17/2013
Origin: BWI	Destination: California
Purpose: Attend Bi-Annual Fungal Genetics Conference	

Etravel Approval | [Etravel Approval History](#)

APPROVAL WORKLIST HISTORY

Navigation: Favorites | Main Menu > Accounts Payable > AP/Travel Forms > Etravel Approval

Travel Request Number 60105

Business Unit UMBC1 **Approval Status** In Process

Personalize | Find | View All | First 1-3 of 3 Last

Workflow Step	Approver ID	Originator OperID	Approver Notified	Approver Reviewed	Approval Action		
1 Etravel Foreign Approval	DSYLVA	SLONG	02/02/16 3:26:11PM			+	-
2 Etravel Foreign Approval	KIRBY	SLONG	02/02/16 3:26:11PM			+	-
3 Etravel General Approval	SLONG	KEDZIERS	02/02/16 10:25:20AM	02/02/16 3:09:53PM	02/02/2016 3:26:12.000000PM	+	-

Save Return to Search Notify

Etravel Approval | Etravel Approval History

ETRAVEL INCLUDING GRANT FUND

Grant Fund = 1253 or 1114



EMAIL

Notification Email To All Grant Approvers

ETRAVEL FINAL APPROVAL



EMAIL

Notification Email To Submitter

Notification To AP Office



WORKLIST

Worklist Completed



APPROVAL RECORD

Approval Record Set From "Pending" To
Approved Status.



NOTIFICATION OF FINAL APPROVAL

Etravel Request Approved



Inbox x



UMBC-FINANCE@umbc.edu

3:49 PM (0 minutes ago) ☆



to me ▾

Etravel Request 60105 has been approved.

Automated Email, Do Not Reply

APPROVAL WORKLIST HISTORY

Favorites | Main Menu > Accounts Payable > AP/Travel Forms > Etravel Approval

New W

Travel Request Number 60105

Business Unit UMBC1

Approval Status Complete

Personalize | Find | View All | First 1-2 of 2 Last

Workflow Step	Approver ID	Originator OperID	Approver Notified	Approver Reviewed	Approval Action		
1 Etravel General Approval	SLONG	KEDZIERS	02/14/16 9:23:56PM	02/14/16 9:28:27PM	02/14/2016 9:28:34.000000PM	+	-
2 Etravel Foreign Approval	KIRBY	SLONG	02/14/16 9:28:34PM	02/14/16 9:29:45PM	02/14/2016 9:29:51.000000PM	+	-

BENEFITS OF ETRAVEL WORKFLOW

- Standard worklist page for all financial approvals
- Link to worklist page embedded in email
- Requestor does not determine/enter specific approvers on form
- Tighter controls for approvers
- Automated notification/approval process
- Email content tailored to approver group (General, Grants, Foreign)
- Expedite approval process by using notification pool of approvers
- Ability to incorporate trees for department hierarchy based approval

Training & Documentation Update

UMBC 101

Training & Documentation Workgroup

Gina Fischer, Chair

Shared Services Panel Discussion

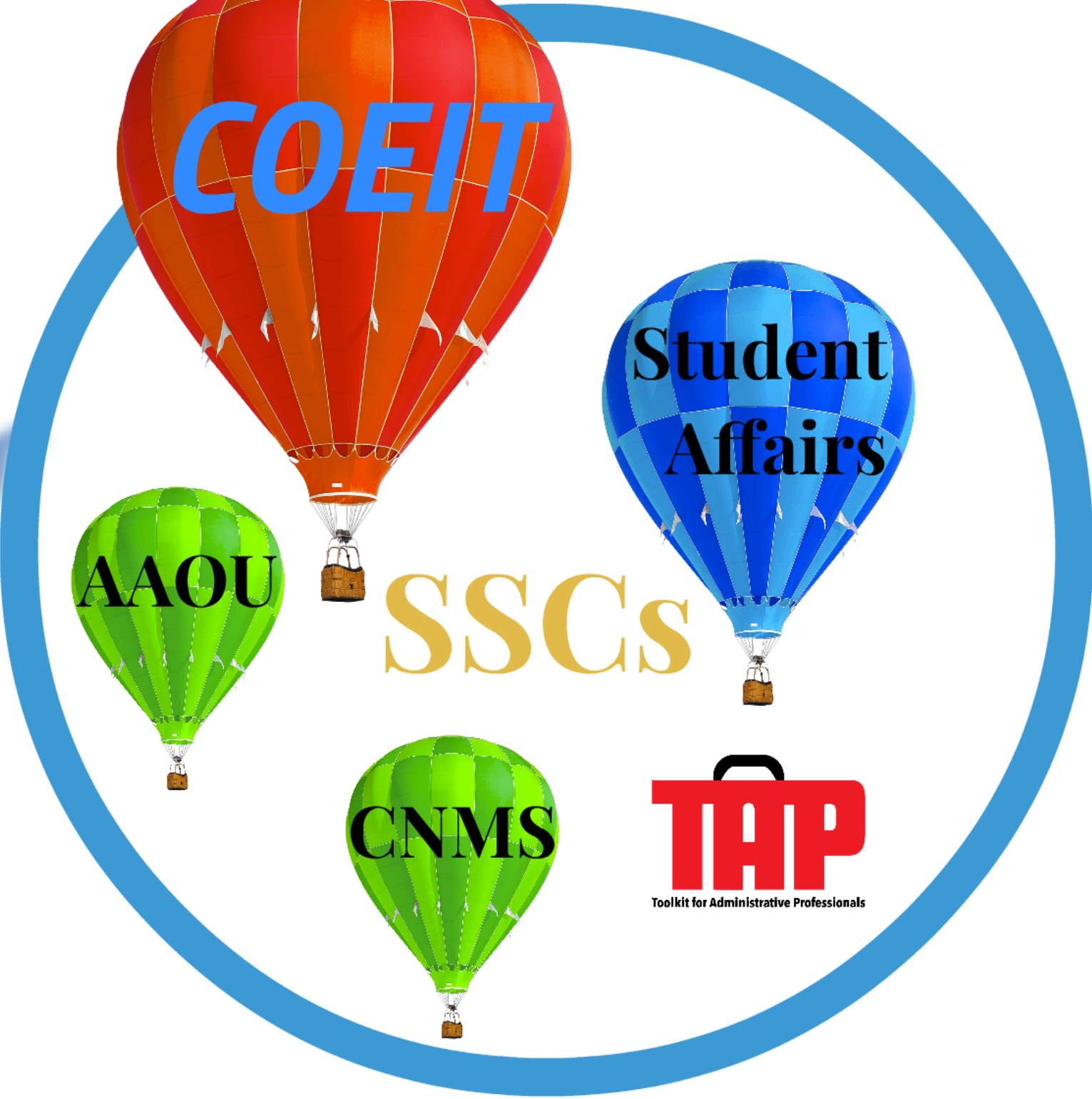
Participants

- **Gina Fischer - Customer**
- **Jane Henderson - SSC Hiring/Payroll**
Mildred Homa - Customer
- **Jacinta Kelly - CNMS Director**
- **Creighton Smith - SSC Procurement**
Nico Washington - AAOU Director



Q & A





COEIT

**Student
Affairs**

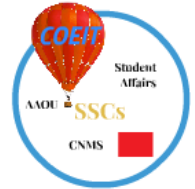
AAOU

SSCs

CNMS

TAP

Toolkit for Administrative Professionals



TAP Update
New Pages Added

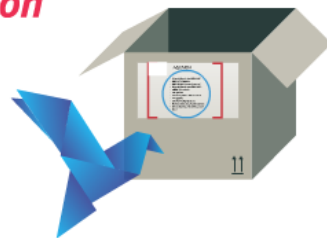
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- Billing Services
- Self-Service Tools
- Hiring New Staff (AQ)
- Awarding Employment to H&A Staff

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