Shared Services Centers
Town Hall

October 27, 2015

Jacinta Kelly
AGENDA

- What is New in the AAOU SSC?
- AAOU RT Statistics
- AAOU Lessons Learned
- What is New in the CNMS SSC?
- CNMS RT Statistics
- TAP Update
- Phase II Update
- BPI Update
- Training & Documentation
- Q & A
What is New in the AAOU Shared Services Center?

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
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)
### AAOU RT Statistics

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

<table>
<thead>
<tr>
<th>Category</th>
<th>July</th>
<th>August</th>
<th>Sept</th>
<th>Oct</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable</td>
<td>00</td>
<td>01</td>
<td>05</td>
<td>08</td>
<td>14</td>
</tr>
<tr>
<td>Payroll &amp; Hiring</td>
<td>03</td>
<td>01</td>
<td>01</td>
<td>15</td>
<td>20</td>
</tr>
<tr>
<td>Procurement</td>
<td>02</td>
<td>00</td>
<td>00</td>
<td>00</td>
<td>02</td>
</tr>
<tr>
<td>Other</td>
<td>02</td>
<td>03</td>
<td>11</td>
<td>18</td>
<td>34</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>07</strong></td>
<td><strong>05</strong></td>
<td><strong>17</strong></td>
<td><strong>41</strong></td>
<td><strong>70</strong></td>
</tr>
</tbody>
</table>
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
Prep Time

PREP TIME
Batman never loses with it

failing to prepare = to fail
Internal Business Process
Communication
Common Knowledge
Surveys

How Are We Doing?

Your Opinion Counts

Success

Failure

Survey Says!
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)

<table>
<thead>
<tr>
<th></th>
<th>July</th>
<th>August</th>
<th>Sept</th>
<th>Oct</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll &amp; Hiring</td>
<td>37</td>
<td>32</td>
<td>41</td>
<td>23</td>
<td>133</td>
</tr>
<tr>
<td>Procurement</td>
<td>12</td>
<td>21</td>
<td>26</td>
<td>13</td>
<td>72</td>
</tr>
<tr>
<td>Totals</td>
<td>49</td>
<td>53</td>
<td>67</td>
<td>36</td>
<td>205</td>
</tr>
</tbody>
</table>
TAP Update

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
<table>
<thead>
<tr>
<th>Task Name</th>
<th>Duration</th>
<th>Start</th>
<th>Finish</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Management</td>
<td>322d</td>
<td>10/01/14</td>
<td>12/24/15</td>
</tr>
<tr>
<td>Conduct weekly w/ co-chairs and PM Meetings</td>
<td>256d</td>
<td>01/01/15</td>
<td>12/24/15</td>
</tr>
<tr>
<td>Manage Status, Risks, Issues, Action Items</td>
<td>256d</td>
<td>01/01/15</td>
<td>12/24/15</td>
</tr>
<tr>
<td>Develop Detailed Project Implementation Plan</td>
<td>88d</td>
<td>10/01/14</td>
<td>01/30/15</td>
</tr>
<tr>
<td>Determine Phase II participants - begin planning</td>
<td>256d</td>
<td>01/01/15</td>
<td>12/24/15</td>
</tr>
<tr>
<td>Keep Action/Risk Log up to date and manage it</td>
<td>256d</td>
<td>01/01/15</td>
<td>12/24/15</td>
</tr>
<tr>
<td>Change Mgmt / Communications</td>
<td>876d</td>
<td>09/01/12</td>
<td>01/08/16</td>
</tr>
<tr>
<td>Develop communications strategy (Campus wide)</td>
<td>544d</td>
<td>09/01/12</td>
<td>10/01/14</td>
</tr>
<tr>
<td>Develop communications strategy (Individual Shared Service)</td>
<td>350d</td>
<td>09/08/14</td>
<td>01/08/16</td>
</tr>
<tr>
<td>Conduct Stakeholder Analysis (AAOU / CNMS)</td>
<td>350d</td>
<td>09/08/14</td>
<td>01/08/16</td>
</tr>
<tr>
<td>Create communications schedule (Campus wide)</td>
<td>45d</td>
<td>12/01/14</td>
<td>01/30/15</td>
</tr>
<tr>
<td>Assign specific comm materials to appropriate to work groups</td>
<td>45d</td>
<td>12/01/14</td>
<td>01/30/15</td>
</tr>
<tr>
<td>Develop template for standard communications (i.e. MyU)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Process Improvement (BPI)</td>
<td>399d</td>
<td>07/01/14</td>
<td>01/08/16</td>
</tr>
</tbody>
</table>
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 being tested. Roll-out anticipated prior to Thanksgiving.
- 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
• Bridget Stone
• Eva Valentine
• Gina Fischer
• Linda Rothfus
• Mae Golden
• Mildred Homa
• Nico Washington
• Trina Torkildsen
### Training & Documentation Curriculum - Prerequisites

<table>
<thead>
<tr>
<th>Audience</th>
<th>Event</th>
<th>Lessons</th>
<th>Modality</th>
<th>Status</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>All PS Users SSC</td>
<td>PeopleSoft Overview</td>
<td>x PPT</td>
<td>Exists</td>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>What is a relational database?</td>
<td>x</td>
<td>update</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>How do the various UMBC systems interact?</td>
<td></td>
<td>update</td>
<td></td>
<td>This needs to be updated to include the SA system, state systems, grant reporting, rex, r25, etc.</td>
</tr>
<tr>
<td></td>
<td>PeopleSoft Finance - what transactions does the end user do</td>
<td></td>
<td>update</td>
<td></td>
<td>create requisitions; reports; etc.</td>
</tr>
<tr>
<td></td>
<td>PeopleSoft HR - what transactions does the end user do</td>
<td></td>
<td>update</td>
<td></td>
<td>PAR changes; statement of payroll charges report; DBEs/RETRS; payroll; view employee history; etc.</td>
</tr>
<tr>
<td></td>
<td>PeopleSoft SA - what transactions does the end user do</td>
<td></td>
<td>update</td>
<td></td>
<td>create advising, class scheduling, permissions, grading, registration, degree audits, transfer credits, class rosters, etc.</td>
</tr>
<tr>
<td></td>
<td>What is a Chartfield string?</td>
<td></td>
<td>update</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Breakdown of the UMBC Chartfield string</td>
<td>x</td>
<td>update</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Account Tree</td>
<td>x x</td>
<td>create</td>
<td></td>
<td>tip - how to access it</td>
</tr>
</tbody>
</table>
Shared Services Centers at UMBC

Shared Services Centers at UMBC
Institutional Group • 249 people

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

**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
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
Communication and Feedback

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

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

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Q & A
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Town Hall

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Ben Lowenthal
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