Shared Services Centers
Town Hall
February 24, 2016
Jacinta Kelly
Ben Lowenthal
Nico Washington

Shared Services Centers
Town Hall
February 24, 2016
Jacinta Kelly
Ben Lowenthal
Nico Washington
AGENDA

- What is New in the AAOU SSC?
- AAOU RT Statistics
- AAOU Add'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

<table>
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|                |     | 1     | 11    | 20    | 62    | 64    | 30    | 38    | 226   |

Total Resolved RT Requests as of 1/31/2016: 226
## Updated RT Statistics

**AAOU Shared Services Center**

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<td>64</td>
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<td>226</td>
</tr>
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</table>
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 1/31/2016)
*A single RT request may include actions for multiple people.

<table>
<thead>
<tr>
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<td>65</td>
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Survey Results (as of 1/31/2016)

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<th>Level of Service</th>
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<td>Excellent</td>
<td>97.0%</td>
<td>95.0% 94.7%</td>
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<tr>
<td>Very Good</td>
<td>1.2%</td>
<td>4.2% 3.5%</td>
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<tr>
<td>Good</td>
<td>1.8%</td>
<td>0.8% 1.8%</td>
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CNMS Shared Services

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<td>1.8%</td>
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</table>
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

UMBC E-Travel Request Form

If this is a supplemental, mark "Yes": * Yes

Associated Travel Request Number: 60105

SUBMIT E-TRAVEL REQUEST

Note: All fields denoted with an * are required.

Travel Agency: * Other
Department: * 10145
Last Name: * MARTEN
First Name: * MARK
Is the traveler an employee? * Yes

This travel request is supplemental to TR#: 60106
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

WF DEPARTMENT SECURITY

User Route Control Profiles

Role Name: UM_WF_ETRAVEL_GENERAL_APPROVAL

User Route Control Profiles

Department Table All

OK Cancel
CONFIRMATION EMAIL TO SUBMITTER

Etravel Workflow Process Initiated

UMBC-FINANCE@umbc.edu
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.
UMBC ETravel form ready for approval

UMBC-FINANCE@umbc.edu
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

### Worklist

**Worklist for SLONG: Stacy Long**

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<thead>
<tr>
<th>Worklist Items</th>
<th>From</th>
<th>Date From</th>
<th>Work Item</th>
<th>Worked By Activity</th>
<th>Priority</th>
<th>Link</th>
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<th>Find</th>
<th>View All</th>
<th>First</th>
<th>1 of 1</th>
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<tbody>
<tr>
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<td>eTravel General Approval WL</td>
<td>eTRAVEL Approval</td>
<td></td>
<td>535, UMBC1_60105</td>
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</table>
**Travel Request Approval**

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

### Approver Comments

- **Agency:** Other
- **Department:** 10145
- **First Name:** MARK
- **Last Name:** MARTEN

### Distribution Of Charges

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

### Costs

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

### Airline

- **Airline:** AirTran
- **Other:**

### Travel

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

**Save** | **View Worklet** | **Previous in Worklet** | **Next in Worklet** | **Notify**
### Approval Worklist History

<table>
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<tr>
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<th>Approver ID</th>
<th>Originator OperID</th>
<th>Approver Notified</th>
<th>Approver Reviewed</th>
<th>Approval Action</th>
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<tbody>
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<td>KEDZIERS</td>
<td>02/14/16 9:23:56PM</td>
<td></td>
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</table>

**Travel Request Number**: 60105

**Business Unit**: UMBC1

**Approval Status**: In Process
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

WF DEPARTMENT SECURITY
UMBC ETravel form ready for foreign travel approval

UMBC-FINANCE@umbc.edu
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***
<table>
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<th>动作</th>
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| Stacy Long| 02/03/2016| Etravel Foreign Approval WL| eTRAVEL Approval   |          | 535_UMRC1_60105|Mark Worked| Reassign
## Approval Record

### Travel Request Approval

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#### Approval Status:

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### Approver Comments

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### Traveler

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<th>Agency: Other</th>
<th>Department: 10145</th>
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<tbody>
<tr>
<td>First Name: MARK</td>
<td>Last Name: MARTEN</td>
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### Distribution Of Charges

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### Costs

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### Airline

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### Travel

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[View Worklet] [Previous in Worklet] [Next in Worklet] [Notify]

[Travel Approval] [ETravel Approval History]
# Approval Worklist History

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<td>2 Etravel Foreign Approval</td>
<td>KIRBY</td>
<td>SLONG</td>
<td>02/02/16 3:26:11PM</td>
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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

UMBC-FINANCE@umbc.edu
to me

Etravel Request 60105 has been approved.

***Automated Email, Do Not Reply***
# Approval Worklist History

## Travel Request Number

60105

## Business Unit

UMBC1

## Approval Status

Complete

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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
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