



Shared Services Centers  
Town Hall

October 27, 2015

Jacinta Kelly  
Ben Lowenthal  
Nick Washington

# Shared Services Centers Town Hall

October 27, 2015

Jacinta Kelly



Jacinta Kelly

Ben Lowenthal

Nico Washington



# 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?



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*

## **AAOU Staff**

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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           | <b>07</b> | <b>05</b> | <b>17</b> | <b>41</b> | <b>70</b> |



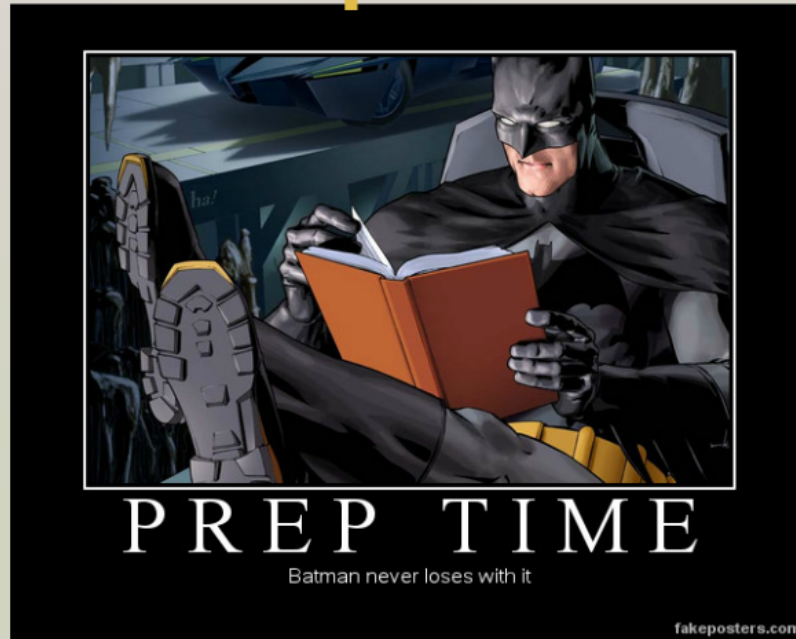


# AAOU Lessons Learned

- 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

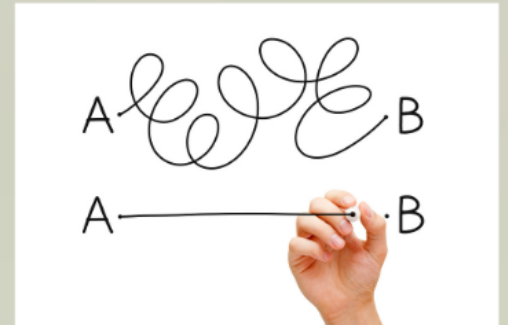
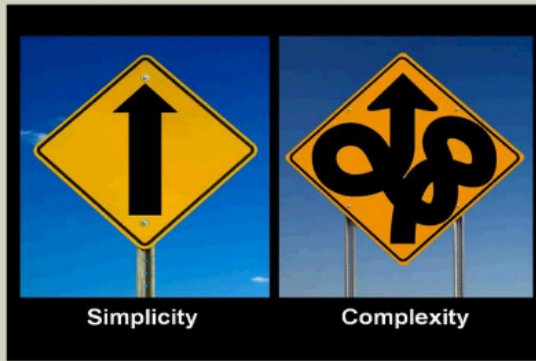


failing = prepare  
to prepare = to fail

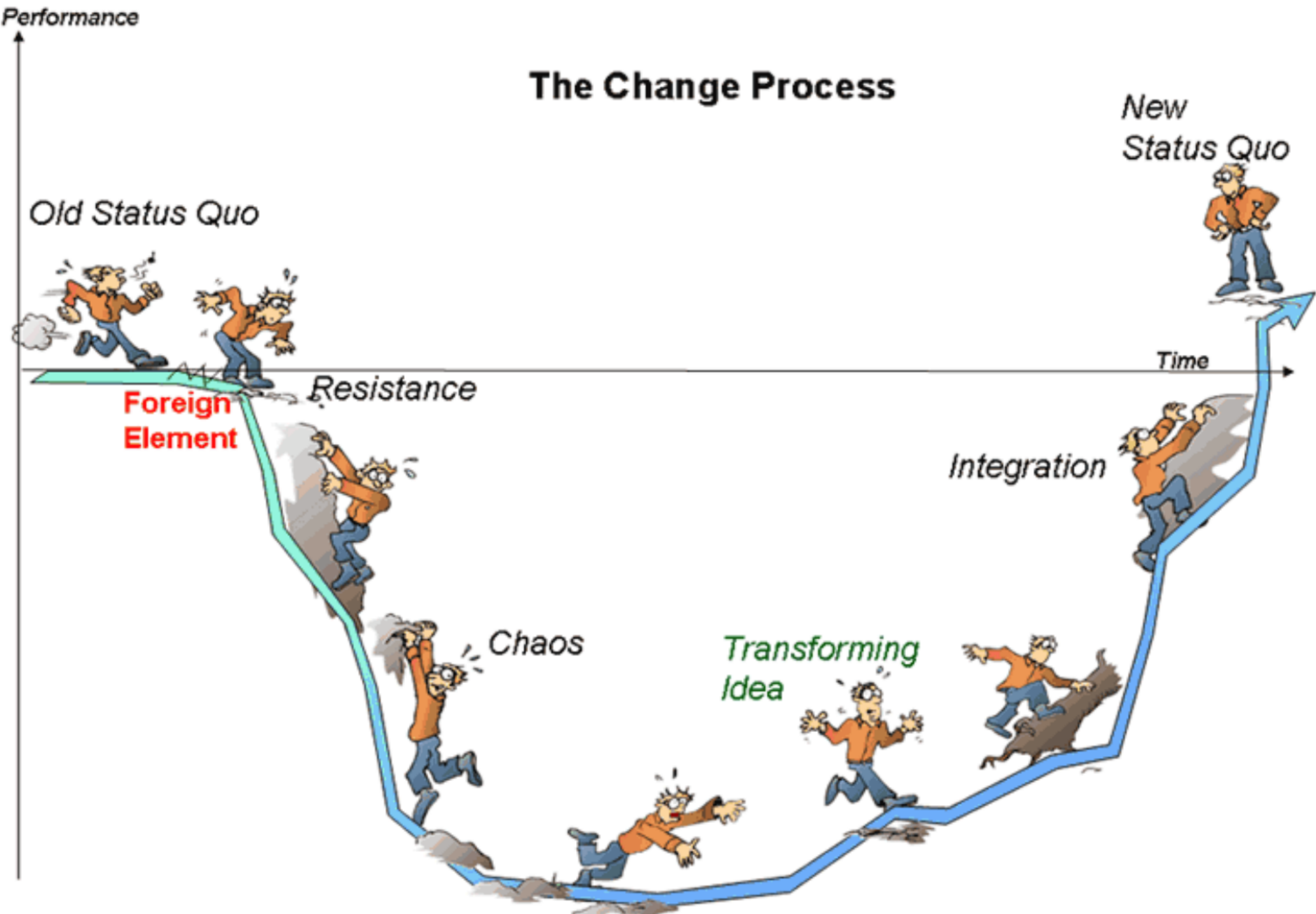
# Internal Business Process



# Complexity



# The Change Process

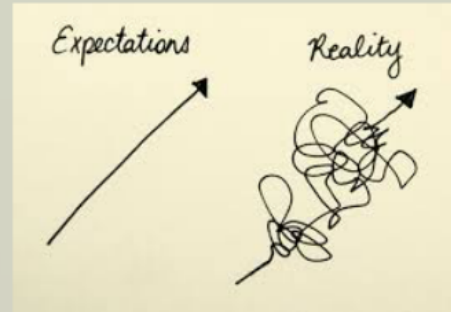
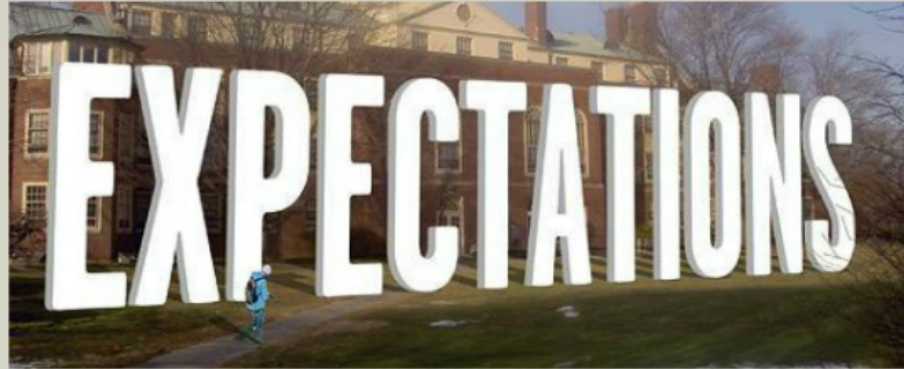


# Communication



# Common Knowledge







# Surveys



# *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         | <b>133</b>    |
| Procurement      | 12          | 21            | 26          | 13         | <b>72</b>     |
| Totals           | <b>49</b>   | <b>53</b>     | <b>67</b>   | <b>36</b>  | <b>205</b>    |

# TAP Update



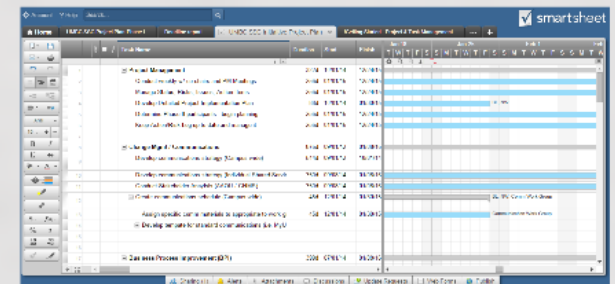
Toolkit for Administrative Professionals

## 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 |  |  |  |  |  |
| 1  | <b>Project Management</b>                                 | 322d     | 10/01/14 | 12/24/15 | [Gantt bars for Project Management tasks]           |   |   |   |   |   |   |        |   |   |   |   |   |   |       |   |   |   |   |   |   |     |   |  |  |  |  |  |
| 2  | Conduct weekly w/ co-chairs and PM Meetings               | 256d     | 01/01/15 | 12/24/15 | [Gantt bar]   |   |   |   |   |   |   |        |   |   |   |   |   |   |       |   |   |   |   |   |   |     |   |  |  |  |  |  |
| 3  | Manage Status, Risks, Issues, Action Items                | 256d     | 01/01/15 | 12/24/15 | [Gantt bar]   |   |   |   |   |   |   |        |   |   |   |   |   |   |       |   |   |   |   |   |   |     |   |  |  |  |  |  |
| 4  | Develop Detailed Project Implementation Plan              | 88d      | 10/01/14 | 01/30/15 | [Gantt bar with BL, NW]                             |   |   |   |   |   |   |        |   |   |   |   |   |   |       |   |   |   |   |   |   |     |   |  |  |  |  |  |
| 5  | Determine Phase II participants - begin planning          | 256d     | 01/01/15 | 12/24/15 | [Gantt bar]   |   |   |   |   |   |   |        |   |   |   |   |   |   |       |   |   |   |   |   |   |     |   |  |  |  |  |  |
| 6  | Keep Action/Risk Log up to date and manage it             | 256d     | 01/01/15 | 12/24/15 | [Gantt bar]   |   |   |   |   |   |   |        |   |   |   |   |   |   |       |   |   |   |   |   |   |     |   |  |  |  |  |  |
| 7  |   |          |          |          |   |   |   |   |   |   |   |        |   |   |   |   |   |   |       |   |   |   |   |   |   |     |   |  |  |  |  |  |
| 8  | <b>Change Mgmt / Communications</b>                       | 876d     | 09/01/12 | 01/08/16 | [Gantt bars for Change Mgmt / Communications tasks] |   |   |   |   |   |   |        |   |   |   |   |   |   |       |   |   |   |   |   |   |     |   |  |  |  |  |  |
| 9  | Develop communications strategy (Campus wide)             | 544d     | 09/01/12 | 10/01/14 | [Gantt bar]   |   |   |   |   |   |   |        |   |   |   |   |   |   |       |   |   |   |   |   |   |     |   |  |  |  |  |  |
| 10 | Develop communications strategy (Individual Shared Servic | 350d     | 09/08/14 | 01/08/16 | [Gantt bar]   |   |   |   |   |   |   |        |   |   |   |   |   |   |       |   |   |   |   |   |   |     |   |  |  |  |  |  |
| 11 | Conduct Stakeholder Anaylsis (AAOU / CNMS)                | 350d     | 09/08/14 | 01/08/16 | [Gantt bar]   |   |   |   |   |   |   |        |   |   |   |   |   |   |       |   |   |   |   |   |   |     |   |  |  |  |  |  |
| 12 | Create communications schedule (Campus wide)              | 45d      | 12/01/14 | 01/30/15 | [Gantt bar with BL, NW, Comm Work Group]            |   |   |   |   |   |   |        |   |   |   |   |   |   |       |   |   |   |   |   |   |     |   |  |  |  |  |  |
| 13 | Assign specific comm materials to appropriate to work g   | 45d      | 12/01/14 | 01/30/15 | [Gantt bar with Communication Work Group]           |   |   |   |   |   |   |        |   |   |   |   |   |   |       |   |   |   |   |   |   |     |   |  |  |  |  |  |
| 14 | Develop tempate for standard communications (i.e. MyU     |          |          |          | [Gantt bar]   |   |   |   |   |   |   |        |   |   |   |   |   |   |       |   |   |   |   |   |   |     |   |  |  |  |  |  |
| 15 |   |          |          |          |   |   |   |   |   |   |   |        |   |   |   |   |   |   |       |   |   |   |   |   |   |     |   |  |  |  |  |  |
| 16 |   |          |          |          |   |   |   |   |   |   |   |        |   |   |   |   |   |   |       |   |   |   |   |   |   |     |   |  |  |  |  |  |
| 17 | <b>Business Process Improvement (BPI)</b>                 | 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 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

## 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<br>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/RETR5; 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   | <a href="#">Intro to PS_ Why</a>   |
|   | Breakdown of the UMBC Chartfield string                     |         |          |    |     |     |      | x   | x      |                        |        | update   | <a href="#">Intro to PS_ Why</a>   |
|   | Account Tree  |         |          |    |     |     |      | x   | x      |                        |        | create   | tip - how to access it   |



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## Prereq

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| Audience  | Event               | Lessons   | Modality |    |     |                |       |     | Status | Additional information   | Links                          |
|   |                     |   | ILT      | EL | QRG | Checklist/mini | Intid | Tip |        |  |                                |
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|   |                     | PeopleSoft HR - what transactions does the end user do      |          |    |     |                |       |     | update | PAR changes; statement of payroll charges report; DBEs/RETRS; 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.   |                                |
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|   |                     | Breakdown of the UMBC Chartfield string                     |          |    |     | x              | x     |     | update |  | <a href="#">Intro to PS_Wh</a> |
|   |                     | Account Tree  |          |    |     |                | x     | x   | create | tip - how to access it   |                                |

# 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

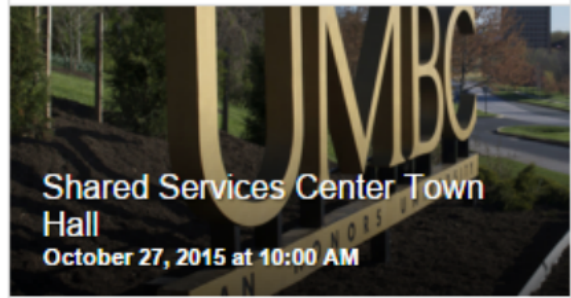


**JUL 22** [Shared Services Town Hall](#)  
 Go-live! Updates on TAP website and Phase I Centers  
**10:00 AM · University Center : 312**  
 Milestone Reached! SSCs Live! Join us at our next Town Hall to celebrate the milestone of establishment of our Phase I centers in AAOU & CNMS! President Hrabowski,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

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

leted rate service

# Communication and Feedback

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



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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**

AAOU Shared Services Center  
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**AAOU RT Statistics**  
 Reached RT Requests (as of 10/20/2015)

|                  | July      | August    | Great     | Call      | Transit   |
|------------------|-----------|-----------|-----------|-----------|-----------|
| Accounts Payable | 00        | 01        | 05        | 05        | 14        |
| Payroll Billing  | 01        | 01        | 01        | 01        | 01        |
| Procurement      | 01        | 00        | 00        | 00        | 01        |
| Advis            | 01        | 05        | 11        | 16        | 04        |
| <b>Totals</b>    | <b>03</b> | <b>08</b> | <b>17</b> | <b>22</b> | <b>20</b> |

*What is New in the AAOU Shared Services Center?*

**AAOU SSC**

AAOUSSC@uakr.edu  
 419-462-6755

# Shared Services Centers Town Hall

October 27, 2015

- Jacinta Kelly
- Ben Lowenthal
- Nico Washington