Updates and Changes to Administrative Services Include:

- **Enhance technologies with updates and improved systems**
  - Update current systems to simplify workflow, expand self-service options, and broaden capabilities available in various systems (e.g., BuySite, GEMS, Workday)
  - *Examples:* The University proposes to move out of UCTime and replace it with a new Workday time & attendance module; implementing a new system to route electronic copies of invoices for approval

- **Improve processes**
  - Reduce manual processes, eliminate hand-offs, clarify roles/responsibilities, and address internal controls
  - *Examples:* Eliminating hand-offs and clarifying responsibilities related to the recruitment process for posting and tracking open positions; replacing equipment disposal forms with electronic forms

- **Update policies**
  - Clarify current policies, create new policies, or revise current policies to reflect changes to processes and responsibilities
  - *Examples:* Developing a more specific GEMS policy outlining items such as the types of purchases that are allowed and when receipts are required; creating a policy outlining offer letter requirements, the process for background checks, and the process for applicant selection

- **Create a Shared Services Office for routine transactions**
  - Develop a new on-campus organization focused on support for routine transactions
  - *Examples:* Supporting development of standard budget variance reports, posting job opportunities, processing payroll, and collecting vendor information
Current AMSS Project Updates

**AMSS Scope**
- Updates and changes will focus on a core set of processes in HR, Procure-to-Pay, and Finance
- A Shared Services Office will be opened to perform specific routine transactional work and help desk support
- Finance Shared Services updates and changes will report to the leadership of the Budget Office
- System modernizations and process improvements within Research Administration and IT are now separate projects

**Roll Out Approach**
- Changes will not occur until campus is ready
- Looking to update 8 processes in the Summer of 2017 (Wave 1)
- Additional updates will be integrated only after the initial implementation is evaluated and working well

**Staffing the Shared Services Office**
- The office will be staffed largely with a reorganization of current staff from Central University HR and Procurement
- A limited number of additional hires will be made into new roles, in particular to provide better help desk support
Planned Activities to Support Units

Some critical steps towards Wave 1 of process updates and changes.

<table>
<thead>
<tr>
<th>May</th>
<th>Summer</th>
<th>When Ready</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty and Staff Communications</td>
<td>Unit Engagement</td>
<td>Roll out of Wave 1 Process</td>
</tr>
<tr>
<td>• Review project scope and plans and provide opportunities for input and discussion.</td>
<td>• Identify and address unit impacts and required support for wave 1.</td>
<td>Changes</td>
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<tr>
<td></td>
<td>• Collaborate on service level agreements and evaluation plans.</td>
<td>• Open Shared Services Office and provide ongoing support for units</td>
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<td>• Communicate and Onboarding</td>
<td></td>
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<td></td>
<td>• Share updates to wave 1 and training schedule</td>
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<td></td>
<td>• Educate Shared Services Office staff about the academic units and their work.</td>
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<td>• Training and Support on the process changes</td>
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<td></td>
<td>• Confirm unit readiness for wave 1 with units.</td>
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</tbody>
</table>

Mid-August at the earliest

The above sequence of activities will be repeated prior to any future changes.
## AMSS Processes

### Human Resources
- Compensation Activities
- HR Data Management
- Payroll
- Exits

### Procure-to-Pay
- Determine Purchase Method
- Non-Purchase Orders
- Contracts
- Vendor Maintenance

### Finance*
- Unit-Level Budget Planning
- Capital Asset Accounting
- Financial Reporting

### Wave 1
- **Staff Planning**
- Staff Recruitment
- Applicant Tracking
- Onboarding
- Benefits
- Leaves
- Time & Attendance
- Student Employment

### Future Waves
- GEMS & Expenses
- Purchase Orders
- Receipt & Invoice Processing

### Terminology
- **Uniform:** Proposed uniform updates or changes
- **Optional:** Proposed optional updates or changes for academic units, these will be uniform for administrative units
- **Piloted:** Proposed piloted in administrative units first and then implemented in academic units in a future wave
- **Underlined:** Proposed process updates or changes that do not involve the Shared Services Office

*Note. Updates and changes to Finance processes will be led by the Budget Office*