

Administrative Modernization and Shared Services



THE UNIVERSITY OF
CHICAGO

Spring 2017 Faculty Forum

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.

Mid-August at the earliest

May		Summer		When Ready
Faculty and Staff Communications	Unit Engagement	Communicate and Onboarding	Training & Support for Faculty & Staff	Roll out of Wave 1 Process Changes
<ul style="list-style-type: none"> • Review project scope and plans and provide opportunities for input and discussion. 	<ul style="list-style-type: none"> • Identify and address unit impacts and required support for wave 1. • Collaborate on service level agreements and evaluation plans. 	<ul style="list-style-type: none"> • Share updates to wave 1 and training schedule • Educate Shared Services Office staff about the academic units and their work. 	<ul style="list-style-type: none"> • Training and Support on the process changes • Confirm unit readiness for wave 1 with units. 	<ul style="list-style-type: none"> • Open Shared Services Office and provide ongoing support for units

The above sequence of activities will be repeated prior to any future changes

AMSS Processes

	Human Resources	Procure-to-Pay	Finance*
Wave 1	<ul style="list-style-type: none"> • Compensation Activities • HR Data Management • Payroll • Exits 	<ul style="list-style-type: none"> • Determine Purchase Method • Non-Purchase Orders • Contracts • Vendor Maintenance 	<ul style="list-style-type: none"> • Unit-Level Budget Planning • <u>Capital Asset Accounting</u> • Financial Reporting
Future Waves	<ul style="list-style-type: none"> • <u>Staff Planning</u> • Staff Recruitment • Applicant Tracking • Onboarding • Benefits • Leaves • <u>Time & Attendance</u> • Student Employment 	<ul style="list-style-type: none"> • GEMS & Expenses • Purchase Orders • <u>Receipt & Invoice Processing</u> 	<ul style="list-style-type: none"> • <u>Accounts Receivable</u> • <u>Account Management</u> • <u>Account Transactions</u> <p><i>*Note. Updates and changes to Finance processes will be led by the Budget Office</i></p>

- 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**