

## Shared Services Update

We have received information regarding the implementation of the Shared Services Center (SSC) that we would like to share with everyone. There will be more details and dates to come, but wanted to share the information below.

### Important Dates and Contact Information

The Shared Services community is anticipated to go live on January 27, 2020, and Customer Care will be available to assist on that date. Shared Services will be located at One Waterfront Place, and there will eventually be three storefronts. HSC will have a storefront on the ground floor of the HSC.

- For general questions, or if you don't have a specific contact, there will be several ways to contact Shared Services.
  - o Phone (304)-293-6006
  - o Email [sharedservices@mail.wvu.edu](mailto:sharedservices@mail.wvu.edu)
  - o Chat
  - o Community log in
  - o Storefront walk-in

### Training

In the E-News last week, it was announced that Shared Services was offering training on Salesforce, their case management and knowledge management tool. A link to sign up for the training was also included. For anyone who did not see the announcement and would like to sign up for training, please see the link directly below. Training will begin later this week and will continue through February and March.

<https://enews.wvu.edu/articles/2020/01/17/register-to-attend-a-wvu-shared-services-salesforce-training-session>

### What is Salesforce?

Salesforce is the case management and knowledge management tool that the SSC will use. It is considered a community in which to obtain support. On the case management side, when someone contacts the Service Center, a case is created and linked to that person's WVU identity. This is the SSC's internal method for tracking all items related to a case. You will also be able to see all changes to your case, as well as seeing all past cases that have been completed. This means that there will no longer be a need to keep track of several emails, and each Service Center member will have active cases they can easily track and work on.

- o The other side of Salesforce is the knowledge base. The knowledge base is where the SSC is storing knowledge from all over the university. They will have articles on many of the processes around campus, with tutorials and step-by-step guides on how to complete them. These articles will also list who to contact if the individual is outside of the Service Center. The Salesforce platform offers a Google like search ability and many reporting tools. This way, if individuals are constantly searching a topic, they can see that they are not finding what they need and create an article to fill this need.
- o Salesforce will also have a community component as well, where individuals can ask

questions to the community. Discussions of processes and procedures can also occur in this location.

### **Implementation Timeframe**

The Customer Care Center will be operational on January 27<sup>th</sup>, but the storefronts and many other processes will open and go live in the following month(s).

### **Purchasing**

It is the ultimate goal of the SSC to approve in lieu of the EBO in Mountaineer Marketplace and MyExpenses. The School will work with the SSC to educate them on policies and funding of our School, and once the SSC staff is fully staffed and trained, those approvals will move to the SSC. This transition will not go live on January 27<sup>th</sup>.

Both travel and hospitality authorizations should still be sent to the SOPH EBO for approval. Should that process change in the future, a communication will be sent out.

### **Check Deposits**

At times, departments or centers have checks that need to be deposited. Depositing checks is one of the processes that Shared Services will ultimately do in lieu of EBOs. The EBO will communicate further information on when that transition will take place, and what the new process should look like, once we learn further details.

### **Timecards**

Shared Services intends to support payroll processes on February 3<sup>rd</sup>, 2020. The SSC will be working with the EBOs to learn more about our current process and obtain any details or information they may need. It is their goal to review and sign-off on timecards in lieu of EBOs. Therefore, someone in the SSC will be reaching out to supervisors who have not approved leave requests, corrected timecard errors, approved timecards, or any other outstanding item each pay period. Therefore, as currently expected, all supervisors must approve leave and timecards, or assign a delegate within your department to do so on your behalf. It is important to understand that the SOPH EBO will still be involved in the timecard and leave process until the SSC is fully staffed and able to take over the process completely.

### **Reconciliations and Reporting**

Shared Services will be generating reconciliations of accounts, fund balance reports, grant reports, etc. This is a process that will be phased in as they become fully staffed and operational. This will be a process that we will need to work with the SSC on so that they can learn what our specific needs are surrounding these processes. The EBO will continue to prepare and send out all reconciliations that are usually sent out until the transition to the SSC has been made. It is also important to understand that Schools will maintain access to reports within the system.

### **Sponsored Projects Questions**

Due to the low staffing in the Grants Reconciliation and Reporting area of Shared Services, the

grants reconciliation process will need to be phased in. Also, it is the ultimate goal that the SSC Grants support will be handling the review and approval of purchases (formerly SOPH Research Office approval in Mountaineer Marketplace and MyExpenses), the review and reconciliation of grant accounts, and the distribution of monthly grant reports. However, due to the remaining vacancies in the SSC Grants office, this transition of approvals and reconciliation will need to be phased in as they become fully staffed and trained.

### **Additional Shared Services Related Questions and Responses**

#### **Will there be a continuous improvement model in place to allow for constructive feedback if the plan of action causes increased effort and/or duplication of effort?**

Shared Services encourages feedback and it will be tracked. A primary purpose of Salesforce, the case management system, is to provide data that can be analyzed. If some of the changes that are implemented are determined to be inefficient, they will make changes and will work with units to do so. For example, if multiple people are continually searching a topic in the case management system, Shared Services staff will be notified. Their Operational Excellence team will then work with the subject matter expert to provide a comprehensive and correct article addressing the topic.

The case management system will track how long each type of case is taking to complete and the number of cases per type and per unit. The possibilities for metrics are endless.

There will also be a discussion board where users can ask questions and discuss current processes and offer ideas on how Shared Services can improve. Shared Services may roll out new processes on their discussion board so that they can get as many opinions as possible before they go live.

Their goal is to make processes better around the university, so they would appreciate any feedback and criticism anyone has to offer.

#### **Having spoken with colleagues at institutions that have made similar moves, they have indicated that bugs still exist in the system several years after the implementation.**

While Shared Services knows that nothing will be perfect, they will still have many of the same individuals doing many of the same jobs, just with extra support. They have studied both successes and failures of other higher education Service Centers. One thing they learned from their studies is that no two service centers are the same, and it is hard to compare them. For example, some Service Centers only complete strategic work, and leave the transactional work in the units.

#### **May we obtain the approval routing for each type of process?**

The SSC is still finalizing some of the system processes. As soon as they are set up, they will share them. Please know that they have incorporated the requested involvement from units that they planned with during the process map sessions. Unit leadership is still included in either notifications or approvals.