Shared Services Meeting
Monday, July 31, 2017 – UW1 361
2:30 - 4:00 PM

Participants: Amy Stutesman, Bill Humphreys, Christine Howard, Ellen Weinstein, Emily Christian, James Miller, Jenny Albrecht, Kendra Yoshimoto, Rita Johnson, Sue Mokhtarnejad

Absent: Carmen Staab, Cindy Shirley, Dan Sullivan

Agenda:
- Shared Services Areas & Staffing Possibilities
- Building a Shared Services Center
- Brainstorm Sequence, Pilot, Involvement & Communications
- Messaging

➢ Areas of Focus

The Launch Committee recommended (1) Workday tasks and (2) expansion of our existing shared service (i.e. eTravel and eReimbursement entry/compliance approval) as initial areas of focus for shared services.

<table>
<thead>
<tr>
<th>Area of Focus</th>
<th>Comments/Next Steps</th>
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<tbody>
<tr>
<td><strong>Workday Tasks</strong></td>
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<tr>
<td>FAS staff are available for this work</td>
<td>- Workday is still evolving</td>
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<td>Related services that could be shared:</td>
<td>- Start where most transactional, and build from there</td>
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<tr>
<td>a) Cost allocation coordinator</td>
<td>- Cost allocations – consider whether this is a budgetary/relational task, and/or it could help people who don't do it often</td>
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<td>b) Faculty entry</td>
<td>- DocuSign and Workday have restrictions: we're stuck with the tool</td>
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<td>c) Student entry</td>
<td>- <strong>Next Step:</strong> Define business goals, tool restrictions and how aligns with Shared Service model</td>
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<td>d) I-9 Coordination</td>
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<td>e) Time &amp; absence</td>
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<td><strong>Travel/Reimbursement</strong></td>
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<tr>
<td>FAS staff are available for this work</td>
<td>- This is an existing Shared Service that can be expanded</td>
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<tr>
<td>Related services that could be Shared:</td>
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<tr>
<td>a) eTravel (point person model)</td>
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<tr>
<td>b) eReimbursement (point person model)</td>
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**Other Areas of Focus**
1. Visa Processing and Glacier
   - FAS staff available
2. Purchasing
   - FAS staff available
      a) BPO
      b) Non-PO invoices
      c) P2I
d) Bidding Process
3. Backup Services
   - New process, requires staff training
   - Remember to collaborate with IT
   - Kendra’s note: FAS staff available, but depends on workload
   - New idea

➢ Brainstorm Workgroup Structure:

- Include FAS staff
- Include ISC/UW Seattle resources and SMEs
- Include business process experts
- Include technical experts
- Include representation from campus stakeholders/implementors
- For Workday:
  ▪ Include Workday security role holders (OEHR, FAS, Administrators and Student Affairs)
  ▪ Recommend breaking down Workday tasks and examining them separately for the Shared Service model:
    • Security role holders identify workgroups/business processes
    • Costing allocation coordinator
    • I-9 coordinator
    • Faculty entry
    • Student entry

Next Steps:
1. Planning group to meet week of August 14
2. Get exec sponsor feedback
3. Communicate progress to campus
4. Formalize workgroup(s) - need a process to do this
5. Identify ways to get stakeholder feedback (i.e. Admin Council, etc.)