

From: [Jeff Barrett](#)
To: [Academic Senate Chair](#)
Subject: 200-45 Conceptual Review - HR and Finance Case Management for the Shared Service Center
Date: Friday, January 07, 2011 10:31:07 AM

Academic Senate Chair,

We'd like to invite the Academic Senate to participate in the following review under the 200-45 Administrative Computing Policy:

Project: Case Management Core Technology for the HR and Finance Shared Service Centers

Sponsors: Organizational Excellence Initiative

Details: <http://admincomputing.ucdavis.edu/projects/oe-hr-fin-case-mgmt.cfm>

Overview:

- In accordance with the Chancellor's Organizational Excellence/Shared Service Center Initiative, "Case Management" is one of six core technologies identified to be implemented, with the primary goals of reducing costs, improving service, and increasing process efficiency in the Human Resources, Finance, and Information Technology Shared Service Centers (SSCs).
- This conceptual review is focused on case management as performed in the HR and Finance SSCs. In the course of this conceptual review, your input is requested to assist in the identification of the requirements for a case management solution. These requirements will be classified and combined with others, and used to assist the preparation of a Request for Proposal (RFP).

Status:

- We are just now initiating the conceptual 200-45 review process for this project, and we are seeking a brief statement summarizing the Academic Senate's feedback/position. You can send any Senate feedback directly to me, in whatever electronic format (Word, PDF, etc.) is most convenient for you.
- As with other projects, 200-45 provides a venue for ongoing review and discussion. In addition to a formal Academic Senate response, direct comments from Senate members are always welcome. (As previously discussed, we are careful to distinguish between individual comments and the official positions of campus organizations.)

Best Regards,

Jeff

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If members wish to comment directly, we have established a SmartSite for 200-45 project reviews. For those who have not yet joined, directions for signing up and participating are as follows:

To access the 200-45 Review SmartSite

1. Go to SmartSite (<http://smartsite.ucdavis.edu>) and select the Log In button in the top right corner.

2. Enter your UC Davis LoginID and password.
3. The first time you access the site, you will need to join the 200-45 Review site so you can participate in the discussion forum.
 - To join, click Membership under the My Workspace tab in the top left corner.
 - Select Joinable Sites at the top of the Membership window.
 - Select Join under the 200-45 Review entry. (The site list is alphabetical, so it should be near the top.)
 - You now should see a 200-45 Review tab to the right of the My Workspace gold tab (or in the More pull-down menu in the upper right corner).

4. Click on the 200-45 Review tab to enter the site.

To provide feedback or ask questions regarding a project under review

1. Within the 200-45 SmartSite, choose Project Forums.
2. Select the specific project (called a Topic in SmartSite) that you would like to discuss.
3. Within a Topic, you can choose Post New Thread to add new comments or questions.
4. To contribute to an existing discussion or respond to a question, select the item of interest and choose Reply.

You can also pose questions directly to the project contacts; they are listed on the project page referenced above.

(For examples of previously submitted projects and feedback, please see <http://admincomputing.ucdavis.edu/projects/>.)

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