




















































































ID	Task Mod	Milest	Task Name	Duration	Start	Finish	Resource Names
0		Yes	<b>Automated ERBCs Deployment</b>	<b>30 days</b>	<b>Thu 3/29/12</b>	<b>Wed 5/9/12</b>	
1							
2		Yes	<b>Identify Deployment Strategy (Publish vs Migration vs Recreate)</b>	<b>1 day</b>	<b>Thu 3/29/12</b>	<b>Thu 3/29/12</b>	<b>Coleman; Marie</b>
3		No	Meetings w/ UIT SharePoint	1 day	Thu 3/29/12	Thu 3/29/12	Coleman; Marie
4		No	Key Consideration Areas:	1 day	Thu 3/29/12	Thu 3/29/12	Coleman; Marie
5		No	- Lists (including Site Assets Docs, etc. and associated Views)	1 day	Thu 3/29/12	Thu 3/29/12	Coleman; Marie
6		No	- Pages (including Definitions, etc)	1 day	Thu 3/29/12	Thu 3/29/12	Coleman; Marie
7		No	- InfoPath Form	1 day	Thu 3/29/12	Thu 3/29/12	Coleman; Marie
8		No	- Workflows	1 day	Thu 3/29/12	Thu 3/29/12	Coleman; Marie
9		No	-- Note: will need to update various workflow code line items to reference the new site text string from sharedev text string usage regardless of deployment method				
10		Yes	<b>Deployment (actual tasks and time depends on method)</b>	<b>20 days</b>	<b>Mon 4/2/12</b>	<b>Fri 4/27/12</b>	<b>Coleman; Marie</b>
11		No	Publish	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Marie
12		No	Migration	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Marie
13		No	Recreate	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Marie
14		No	Summary Objects	20 days	Mon 4/2/12	Fri 4/27/12	Moon; Andy,Co
15		No	Site Assets	20 days	Mon 4/2/12	Fri 4/27/12	Moon; Andy,Co
16		No	EasyTabCode	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Marie
17		No	EasyTabCode2	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Marie
18		No	EasyTabCode3	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Marie
19		No	EasyTabCode4	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Marie
20		No	EasyTabCode5	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Marie
21		No	EasyTabCode6	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Marie



Project: Automated ERBCs Deploy Date: Sun 3/19/17	Task		External Milestone		Manual Summary Rollup	
	Split		Inactive Task		Manual Summary	
	Milestone		Inactive Milestone		Start-only	
	Summary		Inactive Summary		Finish-only	
	Project Summary		Manual Task		Deadline	
	External Tasks		Duration-only		Progress	



















ID	 Task Mod	Milest	Task Name	Duration	Start	Finish	Resource Names
22		No	<i>SummaryProcessDiagram</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
23		No	Lists (including all associated views without being recreated)	20 days	Mon 4/2/12	Fri 4/27/12	Moon; Andy,Coleman
24		No	<i>Definition of Terms</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
25		No	<i>EMPS/ES Assignments</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
26		No	<i>Enhancement Requests (has a number of associated views)</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Marie
27		No	<i>Module Campus Defaults</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
28		No	<i>Sub-Module Lookup</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
29		No	<i>utilWkflwStatUpdates (????)</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
30		No	Pages	20 days	Mon 4/2/12	Fri 4/27/12	Moon; Andy,Co
31		No	<i>Home (ERBC)</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
32		No	<i>Definition of Terms</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
33		No	<i>FAQs</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
34		No	Shared Documents	20 days	Mon 4/2/12	Fri 4/27/12	Moon; Andy,Co
35		No	<i>Process Steps Specifications</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
36		No	<i>UHS Enhancement Request Business Process</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
37		No	InfoPath Form	20 days	Mon 4/2/12	Fri 4/27/12	Moon; Andy,Co
38		No	<i>CustomEnhancements.xsn</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
39		No	Workflows	20 days	Mon 4/2/12	Fri 4/27/12	Moon; Andy,Co
40		No	<i>Meeting Reminder</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
41		No	<i>Module Campus Defaults</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
42		No	<i>Primary Request Workflow</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
43		No	<i>Primary Request Workflow_Additional Field Changes</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
44		No	<i>Secondary Request Workflow_Tasks</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
45		No	<i>Secondary Task Workflow</i>	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari

Project: Automated ERBCs Deploy Date: Sun 3/19/17	Task		External Milestone		Manual Summary Rollup	
	Split		Inactive Task		Manual Summary	
	Milestone		Inactive Milestone		Start-only	
	Summary		Inactive Summary		Finish-only	
	Project Summary		Manual Task		Deadline	
	External Tasks		Duration-only		Progress	

ID	 Task Mod	Milest	Task Name	Duration	Start	Finish	Resource Names
46		No	Secondary Tasks Workflow 2	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
47		No	Tertiary Request Workflow_Status Fields Updates	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
48		No	** Note objects that should be shared with existing 2010 site objects (sync/update/create fields as needed)	20 days	Mon 4/2/12	Fri 4/27/12	Moon; Andy,Coleman
49		No	Calendar, Tasks, Team Discussion	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
50		No	Update workflow code line items	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
51		No	Update Requests Log	20 days	Mon 4/2/12	Fri 4/27/12	Moon; Andy,C
52		No	add field to lookup ERBC.ItemTitle field (associate erbc item to item created in request log)	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Marie
53		No	Updates to other lists (calendar, tasks, discussion, etc...)	20 days	Mon 4/2/12	Fri 4/27/12	Coleman; Mari
54		Yes	<b>Clean user accounts</b>	<b>14 days</b>	<b>Mon 4/2/12</b>	<b>Thu 4/19/12</b>	<b>Shelton; Debra</b>
55		No	1. Users who have both a UHV\ and COUGARNET\ account (UHCL pending)	14 days	Mon 4/2/12	Thu 4/19/12	Coleman; Marie
56		No	- Update list items (ie Request Log, Contacts, etc.) referencing old cougarnet account to use new UHV account (UHCL pending)	14 days	Mon 4/2/12	Thu 4/19/12	Shelton; Debra A
57		No	- Remove duplicative/replaced cougarnet accounts	14 days	Mon 4/2/12	Thu 4/19/12	Coleman; Mari
58		No	2. Users with blank email addresses	14 days	Mon 4/2/12	Thu 4/19/12	Shelton; Debra
59		No	3. Users with erroneous email addresses	14 days	Mon 4/2/12	Thu 4/19/12	Shelton; Debra
60		Yes	<b>Create/Update Group Permissions (ie new ERBC group) and List Permissions (ie ERBC list)</b>	<b>2 days</b>	<b>Fri 4/27/12</b>	<b>Mon 4/30/12</b>	<b>Coleman; Marie A</b>
61		Yes	<b>Training</b>	<b>7 days</b>	<b>Mon 4/30/12</b>	<b>Tue 5/8/12</b>	<b>Coleman; Mari</b>
62		No	EMPS	1 day	Mon 4/30/12	Mon 4/30/12	Coleman; Mari
63		No	Users	1 day	Tue 5/8/12	Tue 5/8/12	Coleman; Mari
64		Yes	<b>Load Manual ERBCs</b>	<b>3 days</b>	<b>Tue 5/1/12</b>	<b>Thu 5/3/12</b>	<b>EMPS</b>
65		Yes	<b>Turn on Workflow</b>	<b>1 day</b>	<b>Fri 5/4/12</b>	<b>Fri 5/4/12</b>	<b>Coleman; Mari</b>
66		Yes	<b>Beta Test an Actual Single Automated ERBC</b>	<b>1 day</b>	<b>Mon 5/7/12</b>	<b>Mon 5/7/12</b>	<b>EMPS</b>

Project: Automated ERBCs Deploy Date: Sun 3/19/17	Task		External Milestone		Manual Summary Rollup	
	Split		Inactive Task		Manual Summary	
	Milestone		Inactive Milestone		Start-only	
	Summary		Inactive Summary		Finish-only	
	Project Summary		Manual Task		Deadline	
	External Tasks		Duration-only		Progress	

ID	 Task Mod	Milest	Task Name	Duration	Start	Finish	Resource Names
67		Yes	Go live	1 day	Wed 5/9/12	Wed 5/9/12	EMPS

Project: Automated ERBCs Deploy Date: Sun 3/19/17	Task		External Milestone		Manual Summary Rollup	
	Split		Inactive Task		Manual Summary	
	Milestone		Inactive Milestone		Start-only	
	Summary		Inactive Summary		Finish-only	
	Project Summary		Manual Task		Deadline	
	External Tasks		Duration-only		Progress	





# Automated Enhancement Request Business Case



# OVERVIEW

❖ Introduction

❖ User Interface

❖ ERBC Processing



# OVERVIEW

❖ **Introduction**

❖ **User Interface**

❖ **ERBC Processing**





# OVERVIEW

## ❖ Introduction

- Paper-to-Digital Business Process Automation
- Automated ERBC FURPS and Toolset Overview
- Business Process Overview

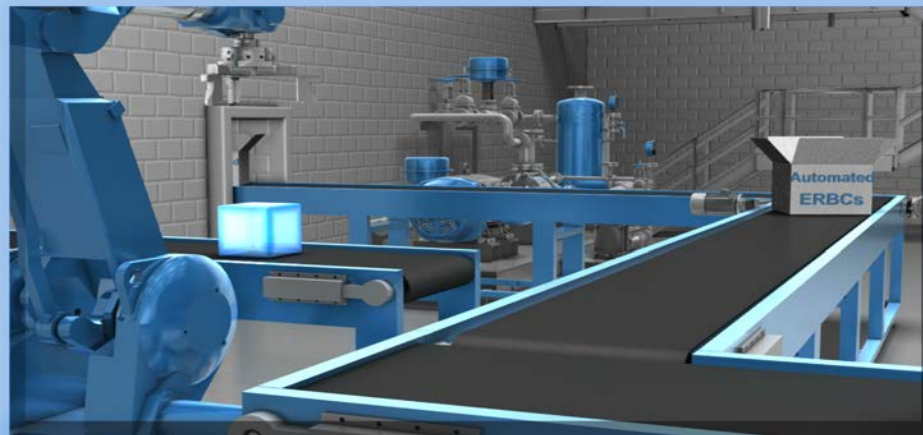


# INTRODUCTION

## Paper-to-Digital Business Process Automation

This new toolset replaces the current business practice of filling out MS Word-based enhancement request forms, and manually routing, processing and approving the requests.

The Enhancement Request Business Case (ERBC) business process automation facilitates conducting business more effectively in the coordination, submission, approval, tracking, and maintaining of Campus Solution enhancement request business cases.





# INTRODUCTION

## Paper-to-Digital Business Process Automation



The ERBC business process automation increases enterprise productivity in a number of key ways:

- **Central Repository and Workspace**
  - It creates a general information workspace environment.
- **Shorter Cycle Times**
  - It optimizes process life cycles by tracking key milestone stages and reducing lag times between the stages, employing user notifications and repeat reminders, and providing dashboards and views to quickly guide users in completing expected tasks.
- **Facilitates “Hands-off” Cycles**
  - It normalizes repetitive information, reduces the number of potential mistakes and missteps, increases the speed of data handling, and manages the flow of information to impacted parties.

# INTRODUCTION

## Paper-to-Digital Business Process Automation



- **Improves Efficiency and Effectuates the Initiative to “Go Green”**
  - It reduces operational costs (i.e. wasted paper and toner in signing/scanning/faxing approvals, equipment usage and life-span, FTE hours in data processing, tracking, routing, and manually communicating status information), standardizes practices, streamlines service delivery, and provides consistency in process execution.
- **Coordinates Tasks and Process-Players**
  - It draws together the various impacted cross-campus and cross-functional user community in moving data between the business process players and coordinating expected business workflow tasks.



# INTRODUCTION

## Paper-to-Digital Business Process Automation



- **Facilitates Governance and Scalability**
  - As a clear, systemic approach to the work process, it provides real-time visibility into how the business process is operating and provides scalability for further process optimization, analytics, and enhancements.
- **Reduces Information Clutter by Incorporating “Target Audience” Business Practices**
  - The Automated ERBC toolset streamlines information messaging and dissemination through strategically targeting information recipients as a function of breaking out individual work-steps within the business process life cycle. Work-step process owners and work-step participants are matched to the individual steps within the process and are notified of information as steps in the flow become active. It reduces the information overload phenomena inherent in the manual processes that overuse “Reply All” and/or all members listed in a distribution group for email dissemination of work information.



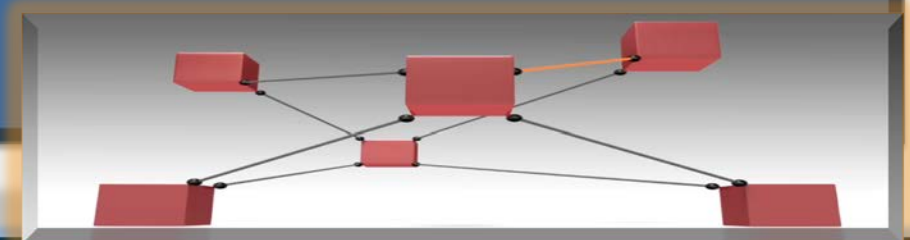
# INTRODUCTION



## Automated ERBC FURPS and Toolset Overview

Hosted within the existing EMPS SharePoint site, the Automated ERBC toolset consists of a collection of custom workflows, forms, lists, pages, and views. FURPS of the toolset include:

- **Functionality**
- Features provided by the automated ERBC toolset include on-line request processing that replaces MS Word-based request submissions; custom form user interface that utilizes lookups, defaults and status views to speed request submission and tracking; numerous form data validation rules are applied to data entry to reduce errors and support data integrity, user notifications and reminders tied to progressions in the request process cycle; a workcenter space to centralize process flow and other information related to enhancement requests; **workflows that perform the heavy lifting for coordinating users and business process tasks**; security leveraging existing site architecture; and real-time statuses with dashboard graphical views that provide a clear, systemic approach of the work process.



# INTRODUCTION

## Automated ERBC FURPS and Toolset Overview

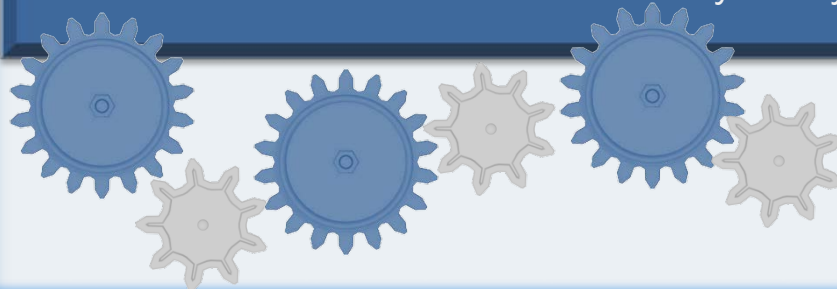


### ➤ Usability

- A core component of the automated ERBC toolset is the request form that has been converted from the prior MS Word-based document to a user friendly online submission custom form that will be familiar to users who have used the old form. The new online form employs rich aesthetics and leverages technological improvements such as lookups and defaults. For existing EMPS SharePoint users, the new automated ERBC toolset as a whole is also consistent with the current look and feel of the host site.

### ➤ Reliability

- The automated ERBC toolset will generally be available to users twenty-four hours daily with the exception of regular SharePoint farm maintenance that occurs every Friday between 2:00 AM to 8:00 AM.



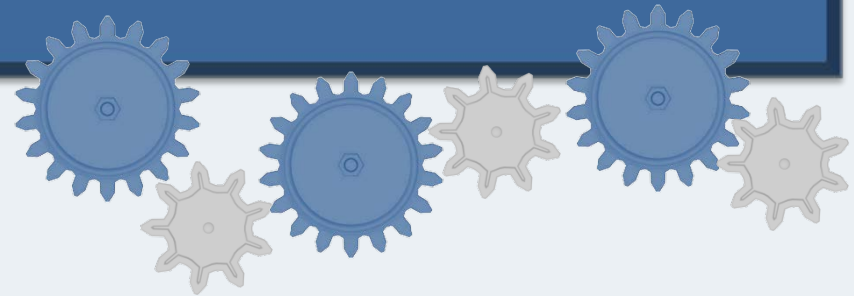


# INTRODUCTION

## Automated ERBC FURPS and Toolset Overview



- **Performance**
  - All components of the ERBC toolset were created and tuned using existing Microsoft SharePoint/InfoPath technology and Enterprise Systems IT architecture. Speed, throughput and response time factors will be the same as existing components on the EMPS SharePoint site.
- **Supportability**
  - Maintenance and extensibility of the toolset is open to all team members of the EMPS Owners SharePoint group. Design structure leverages simple to moderate working knowledge of SharePoint 2010 functionality.

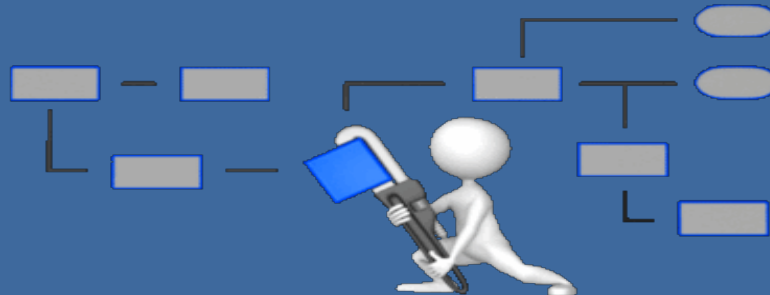


# INTRODUCTION

## Business Process Overview

The ERBC toolset reengineers and integrates the work process for requesting enhancements to the PeopleSoft Campus Solutions system by substantially automating the interactions between cross-functional process participants. Following are two summary diagrams that provide Business Process Modeling overviews of the automated enhancement request business process.

The diagram to the right is a very high-level summary Process Map.



Document Preparation  
and Submission

Requesting Campus  
Review and Approval

EMPS/ES  
Cursory Review  
(24 Hrs)

Other UHS Campuses  
Review and Approval  
(3 Days)

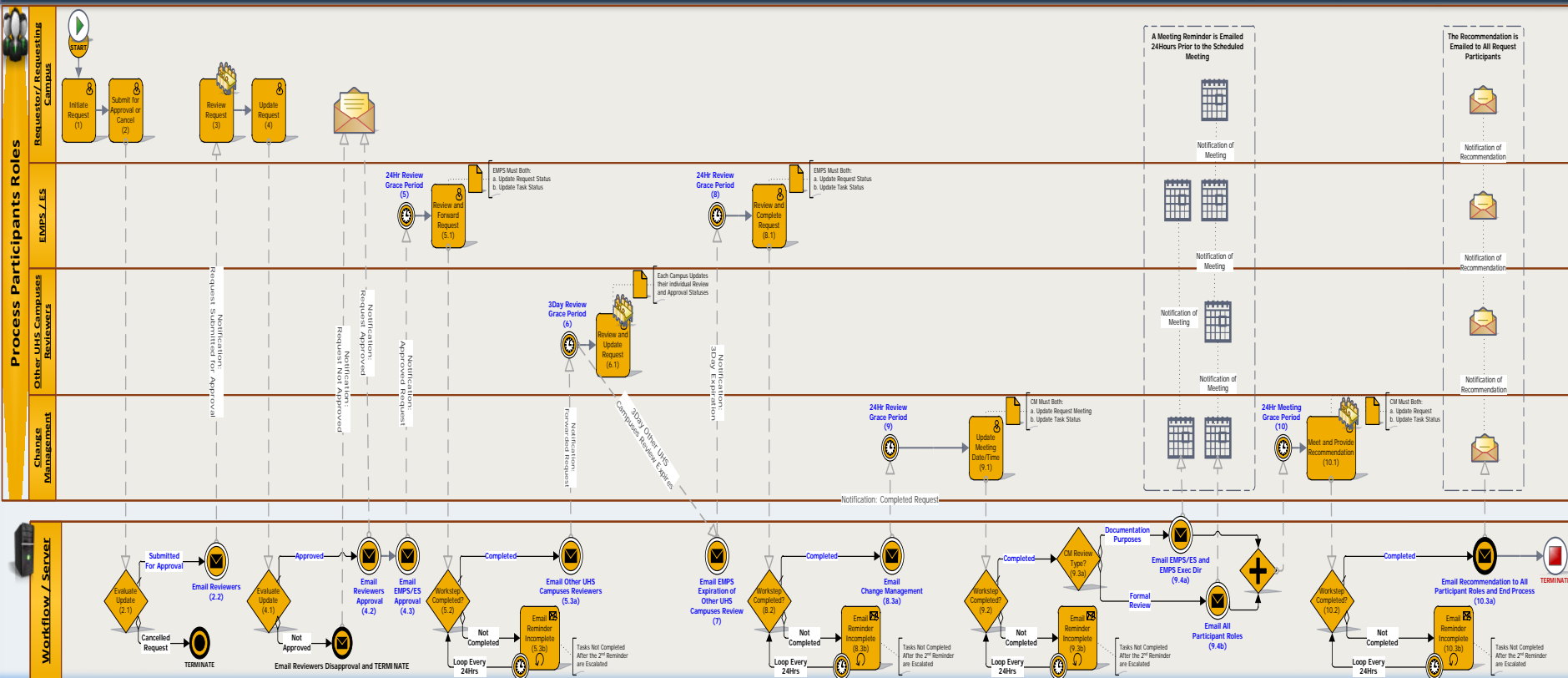
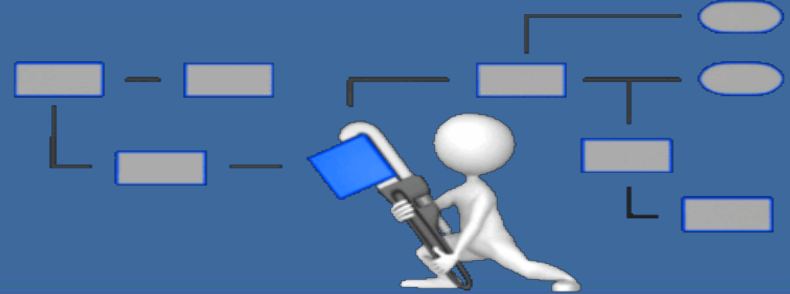
EMPS Final Review  
(24 Hrs)

Change Management  
Review (24 Hrs/Mtg)

# INTRODUCTION

## Business Process Overview

The second diagram below provides a slightly more detailed summary view through BPMN process modeling. For an expanded view of the BPMN flowchart detail, visit the 'ERBC User Guide' (pages 6-7).





# OVERVIEW

❖ Introduction

❖ User Interface

❖ ERBC Processing



# OVERVIEW

## ❖ User Interface

- Accessing the Site and General Navigation
- ERBC WorkCenter (Top Link Bar)
- Quick Launch Links



# USER INTERFACE

## Accessing the Site and General Navigation

The Automated ERBC features are accessed within the existing EMPS SharePoint site, <https://share.uh.edu/emps/>. UHM and UHV users will continue to use their native cougarnet and UHV accounts, UHCL and UHD users will continue to use their sponsored accounts.

Once logged on to the EMPS SharePoint site, you will be directed to the site's default 'Home' page. From there you can navigate to the various site components, including the ERBC components:

- ERBC WorkCenter, Enhancement Requests, Summary Workflow, Workflow/List Multi-View, FAQs, Definition of Terms, EMPS/ES Assignments, Module Campus Defaults, ERBC Discussions, and Sub-Module Lookup.

The screenshot displays the EMPS SharePoint Home page. The top navigation bar includes links for Home, ERBC WorkCenter, Academic Advising, Admissions, Campus Community, CRM, Financial Aid, Reporting, Security, SEVIS, Student Financials, Student Records, and Student Recruiting. A search bar is located on the right. The main content area features a 'Welcome to the Enrollment Management Production Support SharePoint site!' message and a 'Meet the Team' section with a table of team members.

Last Name	First Name	Business Phone	E-mail Address	Hours	Office	Business Area
Chaney	Jackie	(713) 743-4067	jchaney@central.uh.edu	7:00 AM - 4:00 PM	ERP3 270F	Campus Community, CRM, EMPS, Student Recruiting
Coleman	Marie	(713) 743-9762	macolem3@central.uh.edu	9:00 AM - 6:00 PM	ERP3 270L	EMPS, Reporting
Gantt	Alicia	(713) 743-8326	agantt@uh.edu	7:00 AM - 4:00 PM	ERP3 270L	Admissions, CRM, EMPS
Glickman	James	(713) 743-8731	jglickma@central.uh.edu	7:00 AM - 4:00 PM	ERP3 270I	EMPS, Security
Gouveia Correia	Rosa		rmgouvei@central.uh.edu		ERP3 271	EMPS
Hampton	Charita	(713) 743-8536	champton@central.uh.edu	8:00 AM - 5:00 PM	ERP3 270B	EMPS, Financial Aid, Student Financials
Handy	Mark	(713) 743-0359	mahandy@central.uh.edu	7:00 AM - 4:00 PM	ERP3 270I	EMPS, Financial Aid, Student Financials
King	Gayle	713-743-1041	gking@central.uh.edu	8:30 AM - 5:30 PM	ERP3 270M	Academic Advising, EMPS, Student Records
Lee	Sara	(713) 743-1611	slee5@uh.edu	8:30 AM - 5:30 PM	ERP3 270K	Academic Advising, EMPS
McGhee	Katrina	(713) 743-3743	kmcghee@central.uh.edu	9:00 AM - 6:00 PM	ERP3 271A	EMPS
Mills	Shane	(713) 743-5739	smills@central.uh.edu	7:00 AM - 4:00 PM	ERP3 270J	EMPS, Financial Aid, Student Financials
Nguyen	Nhi	713-743-8549	nnguye2@central.uh.edu	9:00 AM - 6:00 PM	ERP3 270D	EMPS, Student Records
Saeed	Javana	(713) 743-8582	jsaeed@central.uh.edu	7:00 AM - 4:00 PM	ERP3 270J	EMPS, Security
Selley	Mika	(713) 743-1010	mgselley@uh.edu		ERP3 271-2	Academic Advising, EMPS
Shelton	Debbie	(713) 743-8793	dshelto@central.uh.edu	8:30 AM - 5:30 PM	ERP3 271	EMPS
Starr-Holcombe	RoLana	(713) 743-4123	rstarr@uh.edu	8:30 AM - 5:30 PM	ERP3, 169A	Admissions, Campus Community, EMPS, SEVIS, Student Recruiting
Trantero	Riod	(713) 743-4496	rtran@central.uh.edu	9:00 AM - 6:00 PM	ERP3 270C	Campus Community, EMPS, SEVIS



# USER INTERFACE

## ERBC WorkCenter (Top Link Bar)

Accessible as a tab within the Top Link Bar at the top of the EMPS SharePoint site is a link to the “ERBC WorkCenter” page. The ERBC WorkCenter page is the primary repository for all information related to the enhancement request business case process. It “highlights” summary points of view on various aspects, stages, and users involved in the creation, processing and tracking of ERBCs.

Summary information highlighted on the ERBC WorkCenter page include:

- **Page Links:** In the top left corner of the page are links to other ERBC pages. To navigate from the ERBC WorkCenter page to one of the other pages, click on the desired link. The reference quick links include FAQs, Definition of Terms, Summary Workflow At A Glance, and Summary Workflow/List Data Multi-View.

EMPS - ERBC Work Center

Site Actions + Browse Page

EMPS - ERBC Work Center

Home ERBC WorkCenter Academic Advising Admissions Campus Community CRM Financial Aid Reporting Security SEVIS Student Financials Student Records Student Recruiting Search this site...

EMPS Academic Team Meeting

Recently Modified

StudentRecords

ERBC\_wfd MultiView

ERBC Work Center

ERBC\_wfd

FAQs

EMPS Documents

Shared Documents

EMPS Events

Shared Calendar

Announcements

EMPS Logs

Requests Log

Duplicate IDs Log

External Organization ID Request Log

External Organization Duplicate ID Clean Up Log

DIARG Production Log

Graduation Task List

Graduation Issue List

Tuition & Fee Structure Log

Cougar Check In System

Appointment Scheduler System

Hyland/Singularity Imaging and OCR

Workflow Project Issues List

Welcome to the Enrollment Management Production Support SharePoint site!

**ERBC**

>>FAQs

>>Definition of Terms - Collapsed View

>>Definition of Terms - Expanded View

>>Summary Workflow At A Glance

>>Summary Workflow List Data Multi-View

**Change Management UHS Enhancement Request Business Case**

Goals of the Change Management Business Process:

- To provide transparency of all UHS enhancement requests
- To ensure that enhancement requests are in line with university and system goals and initiatives
- To better optimize functional and technical resources
- To leverage requests in an effort to accommodate common goals

Business Process: [UHS Enhancement Request Business Process](#)

User Guide: [UHS Enhancement Request Business Case](#)

Create a new enhancement request: [Enhancement Request Business Case](#)

All Requests Approval-UHCL Approval-UHD Approval-UHM Approval-UHV

Pending-CH (Documentation) Pending-CH (Formal) Pending-EMPS Analyst Not Submitted Recommendations See All Views

My Active Tasks All Active Tasks

Tasks Due Today Past Due Tasks All Tasks See All Views

My Active Tasks

# USER INTERFACE

## ERBC WorkCenter (Top Link Bar)

- Goals of the Change Management Business Process: Located in the top left of the page are the goals of the process.
- Resource Documentation: Available resource documentation, including this user guide, is located in the top left of the page.
- Enhancement Requests – Filtered Views: Located on the mid-left of the page is a “grouped” collection of views that provide various filters of the enhancement requests.

- This collection of views allow for quick analysis of requests per the stage in the business process the requests are in. Provided quick views include: All Requests, Approval-UHCL, Approval-UHD, Approval-UHM, Approval-UHV, Pending-CM (Documentation), Pending-CM (formal), Pending-EMPS Analyst, Not Submitted, Recommendations.

**Change Management UHS Enhancement Request Business Case**

**Goals of the Change Management Business Process:**

- To provide transparency of all UHS enhancement requests
- To ensure that enhancement requests are in line with university and system goals and initiatives
- To better optimize functional and technical resources
- To leverage requests in an effort to accommodate common goals

**Business Process:** [UHS Enhancement Request Business Process](#)

**User Guide:** [Enhancement Request Business Case](#)

**Create a new enhancement request:** [Enhancement Request Business Case](#)

**Enhancement Requests Filtered Views Collection**

All Requests | Approval-UHCL | Approval-UHD | **Approval-UHM** | Approval-UHV

Pending-CM (Documentation) | Pending-CM (Formal) | Pending-EMPS Analyst | Not Submitted | Recommendations | See All Views

My Active Tasks | All Active Tasks

Tasks Due Today | Past Due Tasks | All Tasks | See All Views

**Approval-UHM**

Enhancement Request Title	Request Number	Date Desired in Production	Business Area
Count: 17			
z2	CMR-00002	8/31/2012	Reporting
z3	CMR-00003	8/31/2012	Reporting

**My Active Tasks**

Title	Related Content	Assigned To	Due Da
There are no items to show in this view of the "Tasks" list. To add a new item, click "New".			
<a href="#">Add new item</a>			

# USER INTERFACE

## ERBC WorkCenter (Top Link Bar)

- Summary Workflow At A Glance: Located on the lower-left of the page is a list of the enhancement requests displayed as a summary workflow view. This display allows for quick analysis of requests per the stage within the life cycle of the requests. Process indicators include:

- Green Check Mark: Indicates that workstep has been completed.
- Yellow Question Mark: Indicates an action is expected for that workstep, but has not yet been completed.
- Green Thumbs-Up: Indicates that workstep was of type Approval/Disapproval and the AVP/Designee has 'Approved' the request for his/her campus.
- Red Thumbs-Down: Indicates that workstep was of type Approval/Disapproval and the AVP/Designee has 'Not Approved' the request for his/her campus.
- Red 'X': Indicates the requestor cancelled the request.
- Blank: Indicates an action is not expected for that workstep.

ReqNo	Title	Business Area	Requesting Campus	Request Cancelled	Submitted	Request Approval	EMPS Review	Campuses Review-Begin
CMR-00162	Create New CB123 State Report	Reporting	UHV		?	?	?	?
CMR-00160	2160	Reporting	UHV		✓	✓	✓	✓
CMR-00159	2159	Reporting	UHM		✓	✓	✓	✓
CMR-00158	2158	Reporting	UHM		✓	✗		
CMR-00157	2157	Reporting	UHV		✓	✗		
CMR-00156	2156	Reporting	UHM		✓	✗		
CMR-00154	2154	Reporting	UHM		✓	✓	✓	✓

# USER INTERFACE

## ERBC WorkCenter (Top Link Bar)

- Tasks (ERBC) – Filtered Views: Located on the mid-right of the page is a “grouped” collection of views that provide various filters of the Tasks associated with the enhancement requests.

This collection of views allow for quick analysis of ERBC tasks per the stage in the business process the tasks are in. Provided quick views include: **My Active Tasks, All Active Tasks, Tasks Due Today, Past Due Tasks, and All Tasks.**

The screenshot displays the ERBC WorkCenter interface with the following components:

- Top Link Bar:** Includes tabs for 'All Requests', 'Approval-UHCL', 'Approval-UHD', 'Approval-UHM', and 'Approval-UHV'. Below these are filters for 'Pending-CH (Documentation)', 'Pending-CH (Formal)', 'Pending-EMPS Analyst', 'Not Submitted', 'Recommendations', and 'See All Views'.
- My Active Tasks:** A section on the right with sub-tabs for 'My Active Tasks', 'All Active Tasks', 'Tasks Due Today', 'Past Due Tasks', 'All Tasks', and 'See All Views'. It shows a 'Count= 1' for 'Forward Request For Other UHS Campuses Review' assigned to 'Coleman, Mare A' with a due date of '12/10/2012 1:22 PM' in 'Progress' status.
- All Requests Table:** A table listing 133 requests with columns for Request Number, Enhancement Request Title, Date Desired in Production, Business Area, Requesting Campus, and Request Status.
 

Request Number	Enhancement Request Title	Date Desired in Production	Business Area	Requesting Campus	Request Status
CHR-00162	Create New CB123 State Report	12/14/2012	Reporting	UHV	A/P Approved / BHPS Review
CHR-00160	2160	11/13/2012	Reporting	UHV	Recommendation Completed
CHR-00159	2159	11/15/2012	Reporting	UHM	Recommendation Completed
CHR-00158	2158	11/13/2012	Reporting	UHM	A/P Disapproved - Initiating Campus
CHR-00157	2157	11/13/2012	Reporting	UHV	A/P Disapproved - Initiating Campus
CHR-00156	2156	11/20/2012	Reporting	UHM	A/P Disapproved - Initiating Campus
CHR-00154	2154	11/12/2012	Reporting	UHM	Recommendation Completed
CHR-00153	2153	11/12/2012	Reporting	UHM	Recommendation Completed
CHR-00152	2152	11/21/2012	Reporting	UHV	Recommendation Completed
CHR-00151	2151	11/19/2012	Reporting	UHM	Recommendation Completed
- ERBC Calendar:** Shows a calendar view for 'Start Time : 12/10/2012 (1)' with an event for 'CHR-00160: Create New State Report XYZ' on 12/10/2012 at 1:30 PM in 'EXP 3, Room 241' with phone number '713.743.8811, #118'.
- ERBC Announcements:** Includes a posting: '>> Automated ERBC Tool Scheduled for September 17, 2012 Go-live'.
- Summary Workflow At A Glance:** A table showing workflow status for requests:
 

ReqNo/Title	Business Area	Requesting Campus	Request Cancelled	Submitted	Request Approval	EMPS Review	Campuses Review-Begin
CHR-00162 Create New CB123 State Report	Reporting	UHV	✓	✓	?	?	
CHR-00160 2160	Reporting	UHV	✓	✓	✓	✓	
- EMPS Additional Resources:** Lists resources such as '9.0 Upgrade SAHR (Central Reporting Site)', 'Campus Solutions 9.0 PeopleBooks', 'Circular A-21', and 'EMPS - Division of Cost Allocation'.

Tasks Filtered Views Collection



# USER INTERFACE

## ERBC WorkCenter (Top Link Bar)

- [ERBC Calendar](#): On the mid-right of the page is an “ERBC Calendar” web-part that displays scheduled ERBC meetings.
- [ERBC Announcements](#): On the mid-right of the page is an “ERBC Calendar” web-part that displays announcements related to ERBC.
- [EMPS Additional Resources](#): A repository of additional URL links is located on the mid-right of the page.
- [Shared Documents](#): A repository of EMPS Shared Documents is located on the mid-right of the page.
- [ERBC Discussion Threads](#): On the lower-right of the page is an “ERBC Discussion Threads” web-part that displays posted discussions related to ERBC.
- [Module Campus Defaults](#): On the lower-right of the page is a “Module Campus Defaults” web-part that displays the campus users that are defaulted to newly created enhancement requests after the request completes its initial save action for the requesting campus, and completes requesting campus approval for other UHS campuses.

The screenshot displays the ERBC WorkCenter interface with four web-parts, each highlighted by an orange arrow pointing from the right:

- ERBC Calendar**: Shows a table with columns for Title, Start Time, Location, and Phone Bridge/Pin. A sample entry is: "CRM-00160: Create New State Report XYZ" on 12/10/2012 at 1:30 PM in ERP 3, Room 241, with phone bridge #713.743.8811, #110. It includes an "Add new event" link.
- ERBC Announcements**: Shows a "Posting" section with the text ">> Automated ERBC Tool Scheduled for September 17, 2012 Go-live" and an "Add new announcement" link.
- EMPS Additional Resources**: Shows a list of URLs including "9.0 Upgrade SAHR (Central Reporting Site)", "Campus Solutions 9.0 PeopleBooks", "Circular A-21", "DHHS - Division of Cost Allocation", and "Financial Aid FAQ's". It includes an "Add new link" link.
- Shared Documents**: Shows a table with columns for Type, Name, and Modified. The entries are:

Type	Name	Modified
Folder	Academic Advising Shared Documents	2/29/2012 12:23 AM
Folder	Admissions Shared Documents	2/29/2012 12:23 AM
Folder	Campus Community Shared Documents	2/29/2012 12:23 AM
Folder	CRM Shared Documents	2/29/2012 12:23 AM

It includes an "Add new link" link.

# USER INTERFACE

## ERBC WorkCenter (Top Link Bar)

- EMPS/ES Assignments: On the lower-right of the page is an “EMPS/ES Assignments” web-part that displays the EMPS/ES users that are defaulted to newly created enhancement requests after the request completes initial requesting campus AVP/Designee approval.



**ERBC Discussion Threads**

Subject	Created By	Replies	Last Updated
Test	Coleman, Marie A	0	8/29/2012 9:57 AM

[Add new discussion](#)

**Module Campus Defaults**

Module	Sub-Module	Campus	AVP(s) or Designee(s)	Business Owners(s)
Academic Advising		UHCL	Lee, Sara	
Academic Advising		UHM	Lee, Sara	
Academic Advising		UHV	Lee, Sara	
Admissions		UHCL	Gantt, Alice J	Gantt, Alice J
Admissions		UHM	Gantt, Alice J	Gantt, Alice J
Admissions		UHV	Gantt, Alice J	Gantt, Alice J
Campus Community		UHCL	Trantoro, Rod A	Trantoro, Rod A
Campus Community		UHM	Trantoro, Rod A	Trantoro, Rod A
Campus Community		UHV	Trantoro, Rod A	Trantoro, Rod A
Financial Aid		UHCL	Mills, Shane G	Hampton, Charita L
Financial Aid		UHD		
Financial Aid		UHM	Hampton, Charita L	Hampton, Charita L

[Add new item](#)

**EMPS/ES Assignments**

Edit	Category	Tier	Primary	Secondary	ES Technical Mgr
	Academic Advising	Primary	Lee, Sara	King, Gayle D	Shatt, Khalid A

# USER INTERFACE

## Quick Launch Links

In addition to being available from within the “ERBC WorkCenter” repository page, the below ERBC components are also available as a Quick Launch Link on the site’s left navigation toolbar:

- [ERBC WorkCenter](#)
- [Enhancement Requests](#)
- [Summary Workflow At A Glance](#)
- [Workflow/List Multi-View](#)
- [FAQs](#)
- [Definition of Terms](#)
- [EMPS/ES Assignments](#)
- [Module Campus Defaults](#)
- [ERBC Discussions](#)
- [Sub-Module Lookup](#)

- Enhancements
- ERBC WorkCenter
- Enhancement Requests**
- Summary Workflow
- Workflow/List Multi-View
- FAQs
- Definition of Terms
- EMPS/ES Assignments
- Module Campus Defaults
- ERBC Discussions
- Sub-Module Lookup

Edit	Request Number	Enhancement Request Title	Request Status	Requesting Campus
	CMR-00162	Create New CB123 State Report	Document Preparation	UHV
	CMR-00160	z160	AVP Approved / EMPS Review	UHV
	CMR-00159	z159	Recommendation Completed	UHV
	CMR-00158	z158	Recommendation Completed	UHM
	CMR-00157	z157	AVP Disapproved - Initiating Campus	UHV
	CMR-00156	z156	AVP Disapproved - Initiating Campus	UHM

- Enhancements
- ERBC WorkCenter
- Enhancement Requests
- Summary Workflow
- Workflow/List Multi-View**
- FAQs
- Definition of Terms
- EMPS/ES Assignments
- Module Campus Defaults
- ERBC Discussions
- Sub-Module Lookup

Summary Workflow At A Glance

ReqNoTitle	Business Area	Requesting Campus	Request Cancelled	Submitted	Request Approval	EMPS Review
CMR-00163 z163	Reporting	UHV				
CMR-00162 Create New CB123 State Report	Reporting	UHV		✓	✓	✓
CMR-00159 z159	Reporting	UHV		✓	✓	✓
CMR-00158 z158	Reporting	UHM		✓	✓	✓

Quick Filters:  
If there is a timing delay, Refresh your browser.

Requesting Campus: [Dropdown]

Business Area: [Dropdown]

Request: [Dropdown]

List Data

Edit	ReqNoTitle	Request Status	Requesting Campus	Business Area
	CMR-00163 z163	Document Preparation	UHV	Reporting
	CMR-00162 Create New CB123 State Report	AVP Approved / EMPS Review	UHV	Reporting



# OVERVIEW

❖ Introduction

❖ User Interface

❖ ERBC Processing





# OVERVIEW

## ❖ ERBC Processing

- Navigating the Online Form
- Creating an Enhancement Request
- Requesting Campus Review
- EMPS Analyst/ES Cursory Review



# OVERVIEW

## ❖ ERBC Processing

- Other UHS Campuses Review
- EMPS Analyst Final Review
- Scheduling Change Management Review
- Change Management Review

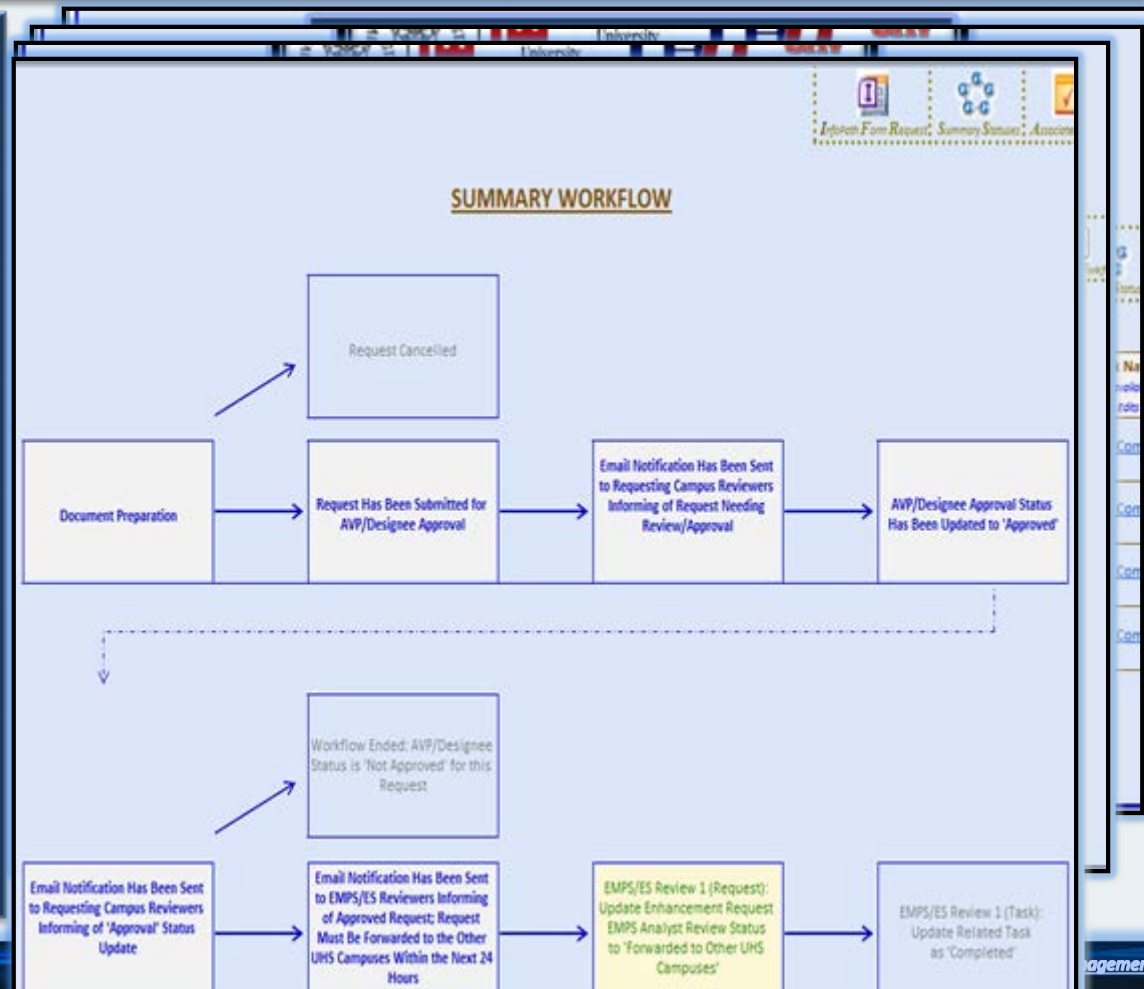


# ERBC Processing

## Navigating the Online Form

The new ERBC processing form is a digital document **directly linked** to the SharePoint list record items. There are four main views housed within the form:

- **Form Data Entry (an edits view):** When opened, the online form defaults to the “Form Request” default view. This view is used to collect the enhancement request supporting information.
- **Associated Tasks (a display only view):** The “Associated Tasks” view is used to coordinate task information related to the request. The view lists each task created against a request, with supporting task information.
- **Summary Statuses (a display only view):** The “Summary Statuses” view is used to highlight Campus Approval Statuses and Key Milestone Statuses.
- **Summary Workflow (a display only view):** The “Summary Workflow” view is used to walk the user through the major worksteps that must be performed for that particular request, presented in a simple graphical left-to-right and bottom-down flow of worksteps.





# ERBC Processing

## Creating an Enhancement Request

The automated enhancement request process begins with the creation of the request online. The requestor initiates the process by prepping the documentation required for the submission of the request. The summary steps for creating an enhancement request are:

- 1) Navigate to one of the ERBC components that provide the command for adding a new enhancement request. This is accessible from either of the following locations: The ERBC WorkCenter repository page by clicking on link “[Enhancement Request Business Case](#)”, through the “[Add New Item](#)” command link on the repository page, and from the Enhancement Requests Quick Launch list page menu ribbon by clicking on the “[New Item](#)” menu icon.
- 2) The Requestor must complete all areas of Section I of the enhancement request form, except for the Review/Approval status fields at the end of the section, prior to submitting the request for requesting campus review and AVP/Designee approval.

The screenshot shows a web browser window titled "Enhancement Requests - New Item". The page features a header with logos for the University of Houston System, UH, University of Houston Clear Lake, UHD, and UHV. Below the logos is the title "UHS Enhancement Request Business Case" and navigation links for "Associated Tasks", "Summary Statuses", and "Summary Workflow".

**Section I – Proposed Enhancement Information:**

Enhancement Request Title:			
Prepared By:	Coleman, Marie A ;	Requesting Campus:	
Business Area / Sub-Module:		Date Desired in Production:	
Type / Category / Resources:	<b>Enhancement Type 1:</b> <input type="checkbox"/> Administrative <input type="checkbox"/> Self-Service	<b>Enhancement Type 2:</b> <input type="checkbox"/> Federal <input type="checkbox"/> State <input type="checkbox"/> Institutional	<b>Enhancement Category:</b> <input type="checkbox"/> Preventative <input type="checkbox"/> Corrective <input type="checkbox"/> Expansion <b>Developer Resources to be Used:</b> <input type="checkbox"/> UHS Developer <input type="checkbox"/> Campus Developer
Description of Request:			
Current Business Practice:			

# ERBC Processing

## Requesting Campus Review

The next phase of the enhancement request life cycle is Requesting Campus Review. The summary steps for Requesting Campus Review are:

- 1) After the Requestor updates the request for submission of review and approval, Workflow sends an email notification to the participants identified in the **Requesting Campus Review** area of **Section I** of the form. A link to the SharePoint item is included in the notification email to allow for quick retrieval of the item to perform the review and make updates to the request.

### Checking for Items in the AVP/Designee's Queue:

Items needing review and approval/disapproval are also located on the **ERBC WorkCenter** repository page in the 'Enhancement Requests Filtered Views Collection' web part. AVP/Designees can go to their respective campus tabs to quickly identify all items needing approval/disapproval to be completed by them.

From: EMPS <sharepoint@uh.edu> Sent: Tue 12/11/2012 3:55 PM  
To: Coleman, Marie A  
Cc: Coleman, Marie A  
Subject: Notification of Enhancement Request CMR-00164: Ceate New CB456 State Report

An enhancement request for your campus review and approval has been submitted by Coleman, Marie A for business area Reporting. Please consult

#### Goals of the Change Management Business Process:

- To provide transparency of all UHS enhancement requests
- To ensure that enhancement requests are in line with university and system goals and initiatives
- To better optimize functional and technical resources
- To leverage requests in an effort to accommodate common goals

**Business Process:** [UHS Enhancement Request Business Process](#)

#### User Guide:

**Create a new enhancement request:** [Enhancement Request Business Case](#)

All Requests	Approval-UHCL	Approval-UHD	Approval-UHM	Approval-UHV	Not Submitted	Recommendations	See All Views
--------------	---------------	--------------	--------------	--------------	---------------	-----------------	---------------

Enhancement Requests Filtered Views Collection

#### Approval-UHV

Enhancement Request Title	Request Number	Date Desired in Production	Business Area
<b>Count= 9</b>			
Develop New xx5 State Report	CMR-00017	9/29/2012	Reporting
Develop New xx6 State Report	CMR-00018	9/29/2012	Reporting

# ERBC Processing

## Requesting Campus Review

The next phase of the enhancement request life cycle is Requesting Campus Review. The summary steps for Requesting Campus Review are:

- 2) Requesting campus review participants should meet to discuss the request. After collaborating on the proposed request and making a determination of whether the enhancement should be pursued, each participant should update the form with their Review Status and the AVP/Designee must update the Approval Status (Approved or Not Approved). Make sure to **Save** all updates made to the document.
- 3) After the status update for AVP/Designee Approval/Disapproval is made, Workflow sends a follow-up email to all requesting campus participants informing them whether the request was Approved or Not Approved. Requests that are Approved are forwarded to EMPS, requests that are Not Approved result in the termination of the process life cycle.

Requesting Campus Review Status: Submitted for AVP Approval [View Module Campus Defaults](#)

Request Presented By: Coleman, Marie A ;

Review:		
Business Owners(s)	Coleman, Marie A ;	Reviewed
Campus Functional Analyst(s)		Not Reviewed
Campus Developer (if to be assigned)		Not Reviewed
Campus Lead(s)		Not Reviewed
AVP(s) or Designee(s)	Coleman, Marie A ;	Approved
Requesting Campus Comments	Acting designee Marie Coleman has approved this request in the AVPs absence. It was determined only the Business Owner and Designee were needed to review this particular request.	

From: EMPS <sharepoint@uh.edu> Sent: Tue 12/11/2012 4:23 PM  
To: Coleman, Marie A  
Cc:  
Subject: Approved: Enhancement Request CMR-00164 (Ceate New CB456 State Report)

The request for **CMR-00164: Ceate New CB456 State Report** has been updated to 'Approved' by AVP/Designee Coleman, Marie A.

Description: THECB has issued a memorandum informing public universities they will be required to submit new CB456 reports beginning Fall 2014.







# ERBC Processing

## EMPS Analyst/ES Cursory Review

The next step in the enhancement request process involves the EMPS Analyst and ES Technical manager performing a cursory review of the requesting campus **Approved** request. Cursory Review **must be completed within the next 24 hours**. The summary steps for EMPS Analyst/ES Cursory Review are:

- 1) After an enhancement request is **Approved** by the requesting campus AVP/Designee, Workflow sends an email notification to the EMPS Analyst and ES Technical manager assigned to that business area. A link to the SharePoint item is included in the notification email to allow for quick retrieval of the item to perform the review and make updates to the request.
- 2) Checking of the **'Summary Workflow'** view first after opening the item should be completed prior to making any edits.
- 3) Review the data in Section I of the request and make updates as appropriate. Also verify the user/participant fields in Section II (other UHS campuses participants) and Section III (change management participants) are correct. Make updates as appropriate, including **'Associated Tasks'** view.

### Section II – Other UHS Campuses, EMPS, and ES Development Review:

ES Manager Review:					
<b>Review:</b>					
ES Manager	Coleman, Marie A ;   Reviewed <span style="border: 1px solid black; padding: 2px;">▼</span>				
Estimated Development Hours	80				
ES Developer (if Campus Developer not assigned)	Coleman, Marie A ;  				
ES Development Comments	It is estimated that 10 eight-hour working days would be required based on the cursory review of the description provided in the request.				
EMPS Analyst Review:					
<i>(Ensure all applicable users from the sister campuses below are populated for workflow notification):</i>					
<b>Review:</b>					
EMPS Analyst	Coleman, Marie A ;   Forwarded to Other UHS Campus: <span style="border: 1px dashed red; padding: 2px;">▼</span>				
Review Type	<b>For Formal Review</b> <span style="border: 1px solid black; padding: 2px;">▼</span>				
Campus(es) and Module(s) Affected	<table border="0"> <tr> <td><b>Campus(es) Affected:</b></td> <td><b>Module(s) Affected:</b></td> </tr> <tr> <td> <input checked="" type="checkbox"/> UHCL  <input type="checkbox"/> UHD  <input checked="" type="checkbox"/> UHM  <input checked="" type="checkbox"/> UHV                 </td> <td> <input type="checkbox"/> Academic Advising  <input type="checkbox"/> Admissions  <input type="checkbox"/> Campus Community  <input type="checkbox"/> Financial Aid  <input checked="" type="checkbox"/> Reporting  <input type="checkbox"/> Security  <input type="checkbox"/> SEVIS  <input type="checkbox"/> Student Financials  <input type="checkbox"/> Student Records  <input type="checkbox"/> Student Recruiting                 </td> </tr> </table>	<b>Campus(es) Affected:</b>	<b>Module(s) Affected:</b>	<input checked="" type="checkbox"/> UHCL <input type="checkbox"/> UHD <input checked="" type="checkbox"/> UHM <input checked="" type="checkbox"/> UHV	<input type="checkbox"/> Academic Advising <input type="checkbox"/> Admissions <input type="checkbox"/> Campus Community <input type="checkbox"/> Financial Aid <input checked="" type="checkbox"/> Reporting <input type="checkbox"/> Security <input type="checkbox"/> SEVIS <input type="checkbox"/> Student Financials <input type="checkbox"/> Student Records <input type="checkbox"/> Student Recruiting
<b>Campus(es) Affected:</b>	<b>Module(s) Affected:</b>				
<input checked="" type="checkbox"/> UHCL <input type="checkbox"/> UHD <input checked="" type="checkbox"/> UHM <input checked="" type="checkbox"/> UHV	<input type="checkbox"/> Academic Advising <input type="checkbox"/> Admissions <input type="checkbox"/> Campus Community <input type="checkbox"/> Financial Aid <input checked="" type="checkbox"/> Reporting <input type="checkbox"/> Security <input type="checkbox"/> SEVIS <input type="checkbox"/> Student Financials <input type="checkbox"/> Student Records <input type="checkbox"/> Student Recruiting				
EMPS Comments	Each campus has a different business practice for capturing the source data that would need to be used, which may impact the scope.				

5 PM

rt

# ERBC Processing

## Other UHS Campuses Review

Following EMPS/ES cursory review, the other UHS campuses review phase begins. This phase has an **allotted three days**. The summary steps for Other UHS Campuses Review are:

1) Workflow sends an email notification to all other campuses populated in Section II of the form. A link to the SharePoint item is included to allow for quick retrieval of the item.

### Checking for Items in the AVP/Designee's Queue:

Items needing review and approval/disapproval are also located on the ERBC WorkCenter repository page in the 'Enhancement Requests Filtered Views Collection' web part. AVP/Designees can go to their respective campus tabs to quickly identify all items needing approval/disapproval to be completed by them.

2) After collaborating on the proposed request, each participant should update the form with their Review Status and the AVP/Designee must update the Approval Status (Approved or Not Approved). Make sure to **Save** all updates made to the document

The screenshot shows an email from EMPS <sharepoint@uh.edu> sent on Tue 12/11/2012 4:42 PM to Coleman, Marie A. The email content includes the following sections:

**Goals of the Change Management Business Process:**

- To provide transparency of all UHS enhancement requests
- To ensure that enhancement requests are in line with university and system goals and initiatives
- To better optimize functional and technical resources
- To leverage requests in an effort to accommodate common goals

The email body contains a link to the SharePoint item: [Enhancement Request Business Process](#) and another link: [Enhancement Request Business Case](#).

The screenshot also shows a SharePoint form with the following sections:

- UHCL Campus Review: *(Ignore this section if you are the Requesting Campus):*
- UHD Campus Review: *(Ignore this section if you are the Requesting Campus):*
- UHV Campus Review: *(Ignore this section if you are the Requesting Campus):*
- UHM Campus Review: *(Ignore this section if you are the Requesting Campus):*

The UHM Campus Review section contains a table with the following data:

Business Owners(s)	Coleman, Marie A ;	Reviewed
Campus Functional Analyst(s)	Coleman, Marie A ;	Reviewed
Campus Developer		Not Reviewed
Campus Lead(s)	Coleman, Marie A ;	Reviewed
AVP(s) or Designee(s)	Coleman, Marie A ;	Approved
Campus Comments	Designee Marie Coleman has approved this request in the absence of the AVP.	



# ERBC Processing

## EMPS Analyst Final Review

Following the expiration of the 3-day Other UHS Campuses Review, the EMPS Analyst performs a final review of the enhancement request. The Final Review **must be completed within the next 24 hours**. The summary steps for EMPS Analyst Final Review are:

- 1) After the expiration of the 3-day Other UHS Campuses Review, Workflow sends an email notification to the EMPS Analyst. A link to the SharePoint item is included in the notification email to allow for quick retrieval of the item to perform the review and make updates to the request.
- 2) Checking of the 'Summary Workflow' view first after opening the item should be completed prior to making any edits.
- 3) As part of the Final Review, the EMPS Analyst makes sure to check that all pertinent information has been entered on the request. Updates are made as appropriate, including 'Associated Tasks' view.

From: EMPS <sharepoint@uh.edu> Sent: Tue 12/11/2012 4:47 PM  
To: Coleman, Marie A

EMPS Analyst Review: *(Ensure all applicable users from the sister campuses below are populated for workflow notification):*

Review:		
EMPS Analyst	Coleman, Marie A ;	Completed
Review Type	For Formal Review	
Campus(es) and Module(s) Affected	<b>Campus(es) Affected:</b> <input checked="" type="checkbox"/> UHCL <input type="checkbox"/> UHD <input checked="" type="checkbox"/> UHM <input checked="" type="checkbox"/> UHV	<b>Module(s) Affected:</b> <input type="checkbox"/> Academic Advising <input type="checkbox"/> Admissions <input type="checkbox"/> Campus Community <input type="checkbox"/> Financial Aid <input checked="" type="checkbox"/> Reporting <input type="checkbox"/> Security <input type="checkbox"/> SEVIS <input type="checkbox"/> Student Financials <input type="checkbox"/> Student Records <input type="checkbox"/> Student Recruiting
	EMPS Comments Coleman, Marie A 12/11/2012 4:37:01 PM Each campus has a different business practice for capturing the source data that would need to be used, which may impact the scope.	

Management

# ERBC Processing

## Scheduling Change Management Review

Following the EMPS Analyst Final Review, Change Management schedules a meeting date/time the change management review will be conducted. The scheduling should be **completed within the next 24 hours**. The summary steps for Scheduling Change Management Review are:

- 1) Workflow sends an email notification to the EMPS Change Management. A link to the SharePoint item is included in the notification email to allow for quick retrieval of the item.
- 2) Checking of the 'Summary Workflow' view first after opening the item should be completed prior to making any edits.
- 3) In the 'CM Review Meeting Date/Time' field in Section III of the form enter the date and time change management will meet to discuss the enhancement request. To the right of the field is link "View Scheduled ERBC Meetings"; click on this link prior to entering the date/time to confirm the desired appointment does not conflict with already scheduled items for that date. Updates are made as appropriate, including 'Associated Tasks' view.

From: EMPS <sharepoint@uh.edu> Sent: Tue 12/11/2012 5:10 PM  
To: Coleman, Marie A

Section III - Change Management Review:

Change Management Review: CM Review Meeting Date/Time: 12/11/2012 5:23 PM [View Scheduled ERBC Meetings](#) [Open Associated Calendar Item](#)

Request Presenter(s): Coleman, Marie A ;

Review:		
EMPS Director	Coleman, Marie A ;	Not Reviewed
ES Director(s)	Coleman, Marie A ;	Not Reviewed
Campus Functional Analyst(s)		Not Reviewed
Campus/ES Developer(s)		Not Reviewed
Campus Lead(s)	Coleman, Marie A ;	Not Reviewed
Technical Manager(s)	Coleman, Marie A ;	Not Reviewed
EMPS Analyst(s)	Coleman, Marie A ;	Not Reviewed

# ERBC Processing

## Change Management Review

The final stage of the enhancement request process is the Change Management review and provision of a Recommendation. The Recommendation should be **completed within 24 hours of the conclusion of the change management meeting**. The summary steps for Change Management Review are:

- 1) Workflow sends an email notification to the EMPS Change Management. A link to the SharePoint item is included in the notification email to allow for quick retrieval of the item. At the conclusion of the change management meeting, EMPS Change Management should make the final updates to the enhancement request.
- 2) Checking of the 'Summary Workflow' view first after opening the item should be completed prior to making any edits.
- 3) Sections IV, V and VI should be completed by EMPS Change Management. Updates are made as appropriate, including 'Associated Tasks' view. After EMPS Change Management completes the Recommendation update on the enhancement request. Workflow sends a final email to all participants.

From: EMPS <sharepoint@uh.edu> Sent: Tue 12/11/2012 5:31 PM  
To: Coleman, Marie A

EMPS/ES Review 2 (Request) | EMPS/ES Review 2 (Task) | Email Notification Has Been Sent to Change Management Informing | Meeting Scheduled (Request)

**Section IV – Reviewers' Recommendations (Completed by Change Management Team):**

Change Management Recommendations:	Option:	Proposed Enhancement and Alternatives:	Estimated Development Hours:	Recommendations
	1	Perform proposed enhancement...	80	The enhancement should be developed.
	2	Continue with current business practice...		Not applicable, as this involves a new state requirement.
	3			
	Upcoming Oracle Improvements			

**Section V – Support for Change Management Team's Recommendation:**

Recommendation Support: The request must be performed to be in compliance with the state.

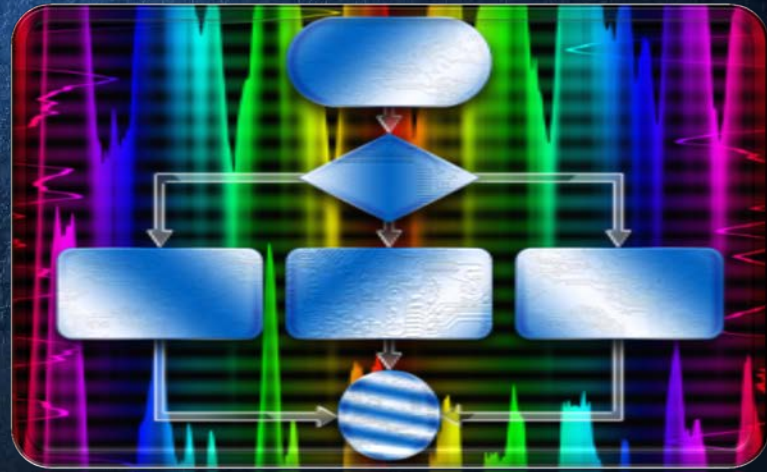
**Section VI – Recommended Enhancements:**

Recommendation: Recommendation Completed: Yes

Perform the requested enhancement



# QUESTIONS



**Also available as an additional and more detailed resource is the *ERBC User Guide***

THANK  
YOU