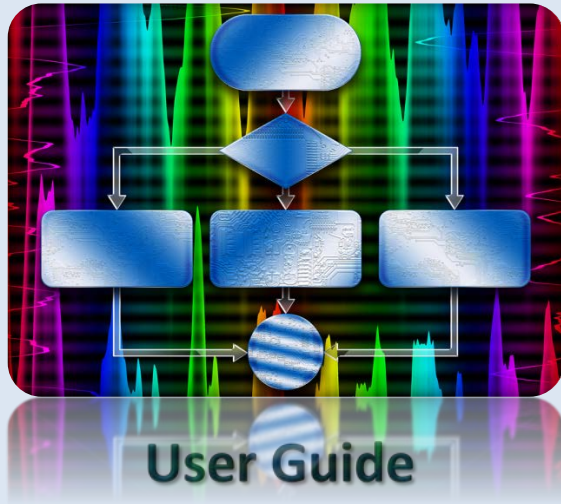


AUTOMATED ENHANCEMENT REQUEST BUSINESS CASE



[UHS PeopleSoft Student Administration Change Management](#)





Table of Contents

(Content Below Is Hyperlinked Within the Guide)

Introduction	4
Paper-to-Digital Business Process Automation.....	4
Automated ERBC FURPS and Toolset Overview.....	5
Business Process Overview.....	5
User Interface	8
Purpose of Guide.....	8
Accessing the Site and General Navigation.....	8
ERBC WorkCenter (Top Link Bar).....	9
Quick Launch Links.....	16
ERBC WorkCenter.....	16
Enhancement Requests.....	17
Summary Workflow At A Glance.....	17
Workflow/List Multi-View.....	19
FAQs.....	20
Definition of Terms.....	21
EMPS/ES Assignments.....	21
Module Campus Defaults.....	22
ERBC Discussions.....	22
Sub-Module Lookup.....	23



ERBC Processing	24
Navigating the Online Form.....	24
Form Data Entry (Edits View).....	24
Associated Tasks (Display Only View).....	27
Summary Statuses (Display Only View).....	28
Summary Workflow** (Display Only View).....	29
Workflow Processing Message (Display Only View).....	31
InfoPath Application Menu Ribbon.....	32
View Command Bar.....	32
Creating an Enhancement Request.....	33
Requesting Campus Review.....	36
EMPS Analyst/ES Cursory Review.....	38
Other UHS Campuses Review.....	42
EMPS Analyst Final Review.....	44
Scheduling Change Management Review.....	48
Change Management Review.....	52
Appendix	57
A. Workflow Notifications and Expected Actions.....	57
B. Other Documentation.....	64
C. Outlook Integration – Viewing ERBC Scheduled Meetings in Outlook.....	64
D. Printing (if necessary).....	68



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 submission, approval, tracking, and maintaining of Campus Solution enhancement request business cases. 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 that acts as a central repository for requests requiring enhancements to the Student Administration PeopleSoft application, housed within the existing EMPS SharePoint site.
- **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.
- **Increases Productivity and 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.
- **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, man hours in data processing, tracking, routing, and manually communicating status information), standardizes practices, streamlines service delivery, provides consistency in process execution, and reduces labor hours associated with manual handling of documentation and manual updates of companion tracking resources such as Excel spreadsheets.
- **Coordinates Tasks and Process-Players.** As a central repository toolset 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.
- **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. It provides scalability for further process optimization, analytics, and enhancements; a potential next phase would be to automate creation of the Request Log item from the Enhancement Request item.
- **Reduces Information Clutter by Incorporating “Target Audience” Business Practices.** Workplace Communication should be strategic. Email, one of the greatest tools created to facilitate dissemination of information, is also one of the most inefficiently and ineffectively used tools in daily operations including “well-intended” business process models that lack strategic audience targeting of information recipients. An interesting study by Microsoft found that it takes an average of 24 minutes to coherently return to a task after someone’s attention has been diverted by some incoming emails; this results in thousands of dollars each year in lost productivity. 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.





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.
- **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.
- **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.

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. Below are two summary diagrams that provide Business Process Modeling overviews of the automated enhancement request business process. The first diagram is a very high-level summary Process Map, the second diagram provides a slightly more detailed summary view through BPMN process modeling and is preceded by a process summarization.

Diagram 1: ERBC Business Process Map (High-level Summary)



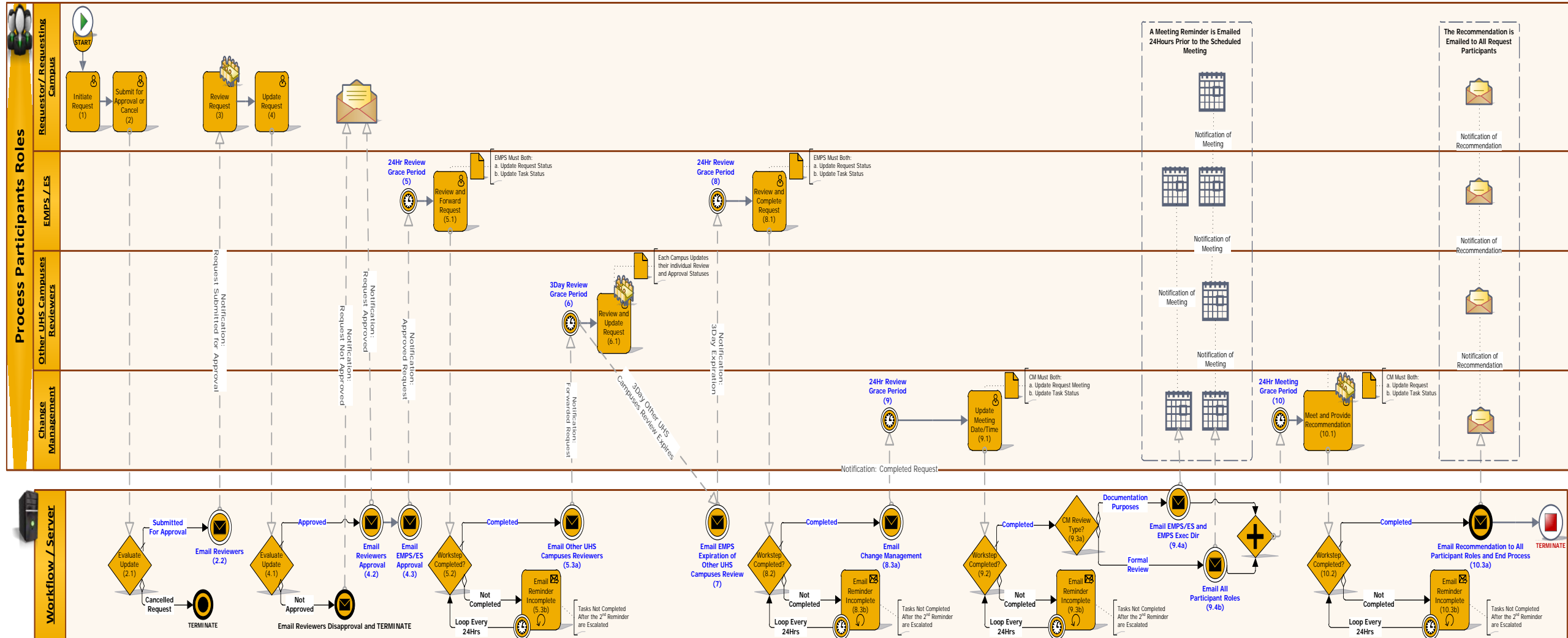


ERBC BPMN PROCESS SUMMARY

1. Requestor initiates the digital enhancement request.
2. Requestor either completes the required initial documentation or cancels the request. After completing the initial documentation, the requestor updates the status of the request for submission to the Requesting Campus Reviewers and approval/disapproval by the AVP/Designee. If the request is cancelled, the process and workflow terminates. If the request is submitted for review and AVP/Designee approval, an email notification is sent to the Requesting Campus Reviewers informing them of the request, and their needed review and update of the digital document.
3. Requesting Campus Reviewers review the enhancement request and make a determination if the request should be approved.
4. Requesting Reviewers update the appropriate statuses of the request. An email notification is sent to the Requestor and Requesting Campus Reviewers informing of the updated Approval/Disapproval status of the AVP/Designee. If the AVP/Designee does not approve the request, the process and workflow terminates. If the AVP/Designee approves the request, an email notification is sent to the EMPS Analyst and ES Technical Manager informing them of the AVP/Designee approved request.
5. EMPS Analyst performs a cursory review of the request, then updates the status to "Forwarded to Other UHS Campuses" and updates the associated Task as "Completed". If the workstep is not completed within 24 hours, a reminder is emailed to the EMPS Analyst. Worksteps not completed after the second reminder are escalated, and loops through every 24 hours until finished. The ES Technical Manager performs a cursory review and updates cursory technical information such as the potential assigned developer and estimated development hours. Once the request has completed the "Forward to Other UHS Campuses" activity, an email notification is sent to all of the impacted Other UHS Campuses Reviewers informing them of the enhancement request.
6. The impacted Other UHS Campuses (non-initiating campuses) reviews the enhancement request, and each campuses' AVP/Designee and involved reviewers update the digital document with their appropriate review/approval statuses. The Other UHS Campuses have an allotted three days to update the online document with their approval/review statuses.
7. Workflow sends an email notification to the EMPS Analyst informing of the expiration of the 3-Day Other UHS Campuses review.
8. EMPS Analyst completes the request by updating the status to "Complete", and updates the associated Task as "Completed". If the workstep is not completed within 24 hours, a reminder is emailed to the EMPS Analyst. Worksteps not completed after the second reminder are escalated, and loops through every 24 hours until finished.
9. Workflow sends an email notification to Change Management informing of the completion of final reviews and documentation preparation, and that a change management meeting needs to be scheduled. Change Management updates the request with the date/time the change management review meeting will be conducted, and updates the associated Task as "Completed". If the request Review Type is "For Documentation Purposes Only", an email notification informing of the scheduled change management meeting is sent to EMPS/ES and EMPS Exec Director. However, if the request Review Type is "For Formal Review", an email notification informing of the scheduled change management meeting is sent to Requesting Campus Reviewers, Other UHS Campuses Reviewers, EMPS/ES, and Change Management. If the workstep is not completed within 24 hours, a reminder is emailed to the EMPS Program Manager and EMPS Executive Director. Worksteps not completed after the second reminder are escalated, and loops through every 24 hours until finished.
10. A meeting is conducted to discuss the enhancement request. Change Management follows up the meeting by updating the request with a "Recommendation", and updating the associated Task as "Completed". If the workstep is not completed within 24 hours, a reminder is emailed to the EMPS Executive Director and Program Manager. Worksteps not completed after the second reminder are escalated, and loops through every 24 hours until finished. Once the Recommendation workstep is completed, an email notification is sent to all participants on the request informing of the Recommendation provided; the process and workflow terminates.



Diagram 2: ERBC Business Process BPMN Modeling





User Interface

Purpose of Guide

The purpose of the Automated ERBC User Guide is to familiarize users with the application and provide information on the various features and functionality used to create, manage and participate in the automated enhancement request business case process.

Accessing the Site and General Navigation

The Automated ERBC features are accessed from within the existing EMPS SharePoint site, <https://share.uh.edu/emps/>; thus for users already accessing the EMPS host site, the same logon Username and Password that you typically use will continue to be used. UHM and UHV users will continue to use their native cougar net 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, 'Home'.

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.

Navigating to and how to use these ERBC user interface components are explained in detail below.

EMPS - Home

EMPS Academic Team Meeting

EMPS Documents

EMPS Events

EMPS Logs

Meet the Team:

Last Name	First Name	Business Phone	E-mail Address	Hours	Office	Business Area
Chaney	Jackie	(713) 743-4067	jechaney@central.uh.edu	7:00 AM - 4:00 PM	ERP3 270F	Campus Community, CRM, EMPS, Student Recruiting
Coleman	Marie	(713) 743-9762	macole3@central.uh.edu	9:00 AM - 6:00 PM	ERP3 270E	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	gdking@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	Katina	(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	Javarria	(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	dashelto@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
Triantoro	Riod	(713) 743-4496	rtrian@central.uh.edu	9:00 AM - 6:00 PM	ERP3 270C	Campus Community, EMPS, SEVIS

Accomplishments, Milestones, and Other Highlights

EMPS News:



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.

- 1 To access the ERBC repository from the Top Link Bar, navigate to the Top Link Bar at the top of the default Home page, and click on the second tab link (“[ERBC WorkCenter](#)”) to the right of the Home page link.

- 2 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 quick links include:
 - o FAQs
 - o Definition of Terms – Collapsed View and Expanded View
 - o Summary Workflow At A Glance
 - o Summary Workflow/List Data Multi-View



- **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:** use this tab to quickly see all created requests, and make selection of desired items for editing.
 - **Approval–UHCL:** use this tab to quickly see requests needing UHCL AVP/Designee review and approval, and to select desired items for editing.
 - **Approval–UHD:** use this tab to quickly see requests needing UHD AVP/Designee review and approval, and to select desired items for editing.

2b

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](#)

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

Tasks Due Today
Past Due Tasks
All Tasks
See All Views

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

All Requests

Edit	Request Number	Enhancement Request Title	Date Desired in Production	Business Area	Requesting Campus	Request Status
Count= 132						
	CMR-00160	z160	11/13/2012	Reporting	UHV	Recommendation Completed
	CMR-00159	z159	11/15/2012	Reporting	UHM	Recommendation Completed
	CMR-00158	z158	11/13/2012	Reporting	UHM	AVP Disapproved - Initiating Campus
	CMR-00157	z157	11/13/2012	Reporting	UHV	AVP Disapproved - Initiating Campus
	CMR-00156	z156	11/20/2012	Reporting	UHM	AVP Disapproved - Initiating Campus
	CMR-00154	z154	11/12/2012	Reporting	UHM	Recommendation Completed
	CMR-00153	z153	11/12/2012	Reporting	UHM	Recommendation Completed
	CMR-00152	z152	11/21/2012	Reporting	UHV	Recommendation Completed
	CMR-00151	z151	11/19/2012	Reporting	UHM	Recommendation Completed
	CMR-00150	z150	11/19/2012	Reporting	UHV	Request Cancelled

1 - 10

My Active Tasks

Title	Related Content	Assigned To	Due Date	Sta
There are no items to show in this view of the "Tasks" list. To add a new item, click "New".				
Add new item				

ERBC Calendar

Title	Start Time	Location	Phone Bridge/Pin
There are no items to show in this view of the "Calendar" list. To add a new item, click "New".			
Add new event			

ERBC Announcements

Posting

>> Automated ERBC Tool Scheduled for September 17, 2012 Go-live

[Add new announcement](#)

Goals of Change Management Business Process

Resource Documentation

Enhancement Requests Filtered Views Collection



- **Approval-UHM:** use this tab to quickly see requests needing UHM AVP/Designee review and approval, and to select desired items for editing.
- **Approval-UHV:** use this tab to quickly see requests needing UHV AVP/Designee review and approval, and to select desired items for editing.
- **Pending-CM (Documentation):** use this tab to quickly see “For Documentation Only” requests needing Change Management review, and to select desired items for editing.
- **Pending-CM (formal):** use this tab to quickly see “For Formal Review” requests needing Change Management review, and to select desired items for editing.
- **Pending-EMPS Analyst:** use this tab to quickly see requests needing EMPS Analyst review, and to select desired items for editing.
- **Not Submitted:** use this tab to quickly see requests that are still with the Requestor and have not yet been submitted, and to select desired items for

2c

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

My Active Tasks
All Active Tasks

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

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
z4	CMR-00004	8/31/2012	Reporting
z5	CMR-00005	8/31/2012	Reporting
Create New IRxx Report	CMR-00027	10/13/2012	Reporting
z35	CMR-00035	10/13/2012	Reporting
Shelton Test	CMR-00033	10/15/2012	Admissions
z42	CMR-00042	10/15/2012	Reporting
z44	CMR-00044	10/16/2012	Reporting
z58	CMR-00055	10/22/2012	Reporting

1 - 10

[Add new item](#)

[Summary Workflow At A Glance](#)

My Active Tasks

Title	Related Content	Assigned To	Due Date	Status
There are no items to show in this view of the "Tasks" list. To add a new item, click "New".				
Add new item				

ERBC Calendar

Title	Start Time	Location	Phone Bridge/Pin
There are no items to show in this view of the "Calendar" list. To add a new item, click "New".			
Add new event			

ERBC Announcements

Posting

>> Automated ERBC Tool Scheduled for September 17, 2012 Go-live

[Add new announcement](#)

11 | 69



editing.

- o **Recommendations:** use this tab to quickly see requests that have completed the process and have a Recommendation provided.

➤ **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:

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

2d

Enhancement Requests Filtered Views Collection

[All Requests](#)
[Approval-UHCL](#)
[Approval-UHD](#)
[Approval-UHM](#)
[Approval-UHV](#)

[Active Tasks](#)

[Pending-CM \(Documentation\)](#)
[Pending-CM \(Formal\)](#)
[Pending-EMPS Analyst](#)
[Not Submitted](#)

[Recommendations](#)
[See All Views](#)

[Tasks Due Today](#)
[Past Due Tasks](#)

☰

Recommendations

Request Number	Business Area	Enhancement Request Title	Recommended Enhancements
Count= 65			
CMR-00160	Reporting	z160	View Entries...
CMR-00159	Reporting	z159	View Entries...
CMR-00154	Reporting	z154	View Entries...
CMR-00153	Reporting	z153	View Entries...
CMR-00152	Reporting	z152	View Entries...
CMR-00151	Reporting	z151	View Entries...
CMR-00147	Security	Request for security	View Entries...
CMR-00146	Campus Community	2012-11-2 Riord	View Entries...
CMR-00145	Security	James' Issues	View Entries...
CMR-00144	Reporting	Raise for Debbie	View Entries...

1 - 10 ▶

[Add new item](#)

All Active Tasks

Title
Related Content

There are no items to show in this view of the "Tasks"

[Add new item](#)

📅

ERBC Calendar

Title

Start Time : 12/10/2012 (1)

CMR-00160: Create New State Report XYZ

[Add new event](#)

📢

ERBC Announcements

Posting

>> Automated ERBC Tool Scheduled for

[Add new announcement](#)

📚

EMPS Additional Resources

URL

9.0 Upgrade SAHR (Central Reporting & Campus Solutions 9.0 PeopleBooks Circular A-21 DHHS - Division of Cost Allocation Financial Aid FAQ's)

[Add new link](#)

✔

Summary Workflow At A Glance

Summary Workflow At A Glance

ReqNoTitle	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 z160	Reporting	UHV		✓	👍	✓	✓
CMR-00159 z159	Reporting	UHM		✓	👍	✓	✓
CMR-00158 z158	Reporting	UHM		✓	👎		
CMR-00157 z157	Reporting	UHV		✓	👎		
CMR-00156 z156	Reporting	UHM		✓	👎		
CMR-00154 z154	Reporting	UHM		✓	👍	✓	✓

12 | 69



his/her campus.

- o **Red 'X'**: Indicates the requestor cancelled the request.
- o **Blank**: Indicates an action is not expected for that workstep.

➤ **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:

- o **My Active Tasks**: use this tab to quickly see ERBC tasks that are in your personal queue for expected actions, and make selection of desired items for editing. Note: currently Tasks are only created for EMPS Analysts and Change Management participant roles.
- o **All Active Tasks**: use this tab to quickly see all ERBC tasks that are in progress, regardless of which user is assigned to the task, and to select desired items for editing.
- o **Tasks Due Today**: use this tab to quickly see all ERBC active



2e

Tasks Filtered Views Collection

All Requests							My Active Tasks		
Approval-UHCL							All Active Tasks		
Approval-UHD							Tasks Due Today		
Approval-UHM							Past Due Tasks		
Approval-UHV							All Tasks		
Pending CM (Documentation)							See All Views		
Pending CM (Formal)									
Pending EMPS Analyst									
Not Submitted									
Recommendations									
See All Views									

All Requests						
Edit	Request Number	Enhancement Request Title	Date Desired in Production	Business Area	Requesting Campus	Request Status
Count= 133						
	CMR-00162	Create New CB123 State Report new	12/14/2012	Reporting	UHV	AVP Approved / EMPS Review
	CMR-00160	z160	11/13/2012	Reporting	UHV	Recommendation Completed
	CMR-00159	z159	11/15/2012	Reporting	UHM	Recommendation Completed
	CMR-00158	z158	11/13/2012	Reporting	UHM	AVP Disapproved - Initiating Campus
	CMR-00157	z157	11/13/2012	Reporting	UHV	AVP Disapproved - Initiating Campus
	CMR-00156	z156	11/20/2012	Reporting	UHM	AVP Disapproved - Initiating Campus
	CMR-00154	z154	11/12/2012	Reporting	UHM	Recommendation Completed
	CMR-00153	z153	11/12/2012	Reporting	UHM	Recommendation Completed
	CMR-00152	z152	11/21/2012	Reporting	UHV	Recommendation Completed
	CMR-00151	z151	11/19/2012	Reporting	UHM	Recommendation Completed

My Active Tasks				
Title	Related Content	Assigned To	Due Date	Status
Count= 1				
Forward Request For Other UHS Campuses Review	Create New CB123 State Report	Coleman, Marie A	12/10/2012 1:22 PM	In Progress

ERBC Calendar				
Title	Time	Location	Phone bridge/Pin	
Start Up	12/10/2012 1:30 PM	ERP J, Room 241	713.743.0011, #118	

Summary Workflow At A Glance							
ReqNo/Title	Business Area	Requesting Campus	Request Cancelled	Request Submitted	Request Approval	EMPS Review	Campuses Review-Begin
CMR-00162 Create New CB123 State Report	Reporting	UHV	✓	✓	?	?	
CMR-00160 z160	Reporting	UHV	✓	✓	✓	✓	

EMPS Additional Resources	
URL	
9.0 Upgrade SAHR (Central Reporting Site)	
Campus Solutions 9.0 PeopleBooks	
Circular A 21	
DHHS - Division of Cost Allocation	

Note the Correlation Between the Two Web-parts



tasks that have a due date of today, and to select desired items for editing.

- **Past Due Tasks:** use this tab to quickly see all ERBC active tasks that have a past due date, and to select desired items for editing.
- **All Tasks:** use this tab to quickly see all ERBC tasks, and to select desired items for editing.

- **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-

2f

ReqNo	Title	Business Area	Requesting Campus	'Request Cancelled	'Submitted	'Request Approval	'EMPS Review	'Campuses Review-Begin
CMR-00158	z158	Reporting	UHM		✓	⊕	?	?
CMR-00157	z157	Reporting	UHV		✓	⊕	✓	✓
CMR-00156	z156	Reporting	UHM		✓	⊕	✓	✓
CMR-00154	z154	Reporting	UHM		✓	⊕	✓	✓
CMR-00153	z153	Reporting	UHM		✓	⊕	✓	✓
CMR-00152	z152	Reporting	UHV		✓	⊕	✓	✓
CMR-00151	z151	Reporting	UHM		✓	⊕	✓	✓

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	z160	Reporting	UHV		✓	⊕	✓	✓
CMR-00159	z159	Reporting	UHM		✓	⊕	✓	✓
CMR-00158	z158	Reporting	UHM		✓	⊕	?	?
CMR-00157	z157	Reporting	UHV		✓	⊕	✓	✓
CMR-00156	z156	Reporting	UHM		✓	⊕	✓	✓
CMR-00154	z154	Reporting	UHM		✓	⊕	✓	✓
CMR-00153	z153	Reporting	UHM		✓	⊕	✓	✓
CMR-00152	z152	Reporting	UHV		✓	⊕	✓	✓

Title	Start Time	Location	Phone Bridge/Pin
CMR-00160: Create New State Report XYZ	12/10/2012 1:30 PM	ERP 3, Room 241	713.743.8811, #118

URL
9.0 Upgrade SAHR (Central Reporting Site)
Campus Solutions 9.0 PeopleBooks
Circular A-21
DHHS - Division of Cost Allocation
Financial Aid FAQ's

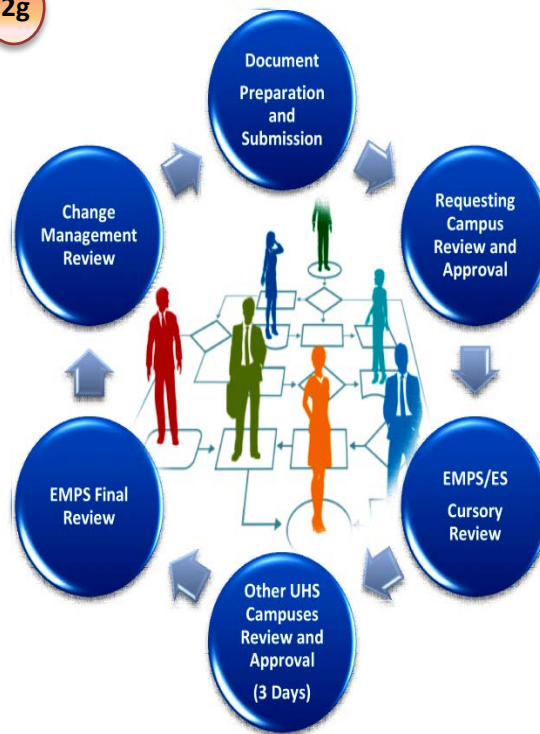
Type	Name	Modified
Folder	Academic Advising Shared Documents	2/29/2012 12:23 AM
Folder	Admissions Shared Documents	2/29/2012 12:23 AM
Folder	Campus Community Shared Documents	2/29/2012 12:23 AM
Folder	CRM Shared Documents	2/29/2012 12:23 AM
Folder	EMPS Academic Tools	1/27/2012 3:50 PM



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 requesting campus, and completes requesting campus approval for other UHS campuses.
- **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.

2g



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, Alicia J	Gantt, Alicia J
Admissions		UHM	Gantt, Alicia J	Gantt, Alicia J
Admissions		UHV	Gantt, Alicia J	Gantt, Alicia J
Campus Community		UHCL	Triantoro, Riod A	Triantoro, Riod A
Campus Community		UHM	Triantoro, Riod A	Triantoro, Riod A
Campus Community		UHV	Triantoro, Riod A	Triantoro, Riod A
Financial Aid		UHCL	Mills, Shane G	Hampton, Charita L
Financial Aid		UHD		
Financial Aid		UHM	Hampton, Charita L	Hampton, Charita L

1 - 12

[Add new item](#)

EMPS/ES Assignments

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



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.

1 ERBC WorkCenter

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. To access the ERBC repository from the Quick Launch toolbar, navigate to the left navigation toolbar, and click on the link (“[ERBC WorkCenter](#)”) located under the “[Enhancements](#)” group heading.

For detailed information on the use of the ERBC WorkCenter page, please refer to the previous section ‘[ERBC WorkCenter \(Top Link Bar\)](#)’ in this guide.

1

EMPS Logs

- Requests Log
- Duplicate IDs Log
- External Organization ID Request Log
- External Organization Duplicate ID Clean Up Log
- DAWG 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

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

EMPS Discussions

- Team Discussion

1

Change Management

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
Pending-CM (Documentation)	Pending-CM (Formal)	Pending-EMPS Analyst	Not Submitted	Recommendations

All Requests

	Edit	Request Number	Enhancement Request Title	Date Desired in Production	Business Area	Requesting Campus
			ERBC WorkCenter	12/13/2012	Reporting	UHV
		CMR-00162	Create New CB123 State Report NEW	12/14/2012	Reporting	UHV
		CMR-00160	z160	11/13/2012	Reporting	UHV
		CMR-00159	z159	11/15/2012	Reporting	UHM
		CMR-00158	z158	11/13/2012	Reporting	UHM
		CMR-00157	z157	11/13/2012	Reporting	UHV
		CMR-00156	z156	11/20/2012	Reporting	UHM



2 Enhancement Requests

The “[Enhancement Requests](#)” Quick Launch Link directs you to the enhancement list items. Enhancement requests can be created, viewed, and tracked from this list.

The list defaults to view “All Items”. There are additional list views available to review the list data, refer to the adjacent screenshot for additional views.

2a

Enhancements	Edit	Request Number	Enhancement Request Title	Request Status	Requesting Campus
ERBC WorkCenter					
Enhancement Requests					
Summary Workflow					
Workflow/List Multi-View		CMR-00162	Create New CB123 State Report NEW	AVP Approved / EMPS Review	UHV
FAQs		CMR-00160	z160	Recommendation Completed	UHV
Definition of Terms		CMR-00159	z159		
EMPS/ES Assignments		CMR-00158	z158		
Module Campus Defaults		CMR-00157	z157		
ERBC Discussions		CMR-00156	z156		
Sub-Module Lookup					
EMPS Discussions					
Team Discussion					

2b

All Items

- DBd: Pending For Documentation Purposes Only
- DBd: Pending CM Review/Recommendation
- DBd: Pending EMPS Review
- DBd: Pending Requestor AVP/Designee Approval
- DBd: Pending Document Submission
- DBd: Pending AVP/Designee Approval_UHCL
- DBd: Pending AVP/Designee Approval_UHV
- DBd: Pending AVP/Designee Approval_UHD
- DBd: Pending AVP/Designee Approval_UHM
- DBd: Recommendations
- DBd: All Requests

3 Summary Workflow At A Glance

The “[Summary Workflow](#)” Quick Launch Link directs you to the graphical indicator representation of enhancement requests per their stages in the business process life cycle. Enhancement requests can be edited, viewed, and tracked from this list.

- 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

3

Enhancements	Summary Workflow At A Glance	Business Area	Requesting Campus	Request Cancelled	Submitted	Request Approved
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						
EMPS Discussions						
Team Discussion						



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.



4 Workflow/List Multi-View

The “[Workflow/List Multi-View](#)” Quick Launch Link directs you to a combined view consisting of the graphical indicator representation of enhancement requests per their stages in the business process life cycle at the top of the page with a corresponding list view of the enhancement requests underneath. A “Quick Filters” section to the left of the page coordinates filtering of the requests by Requesting Campus, Business Area, and Request. Enhancement requests can be edited, viewed, and tracked from this list.

- 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

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
- EMPS Discussions
- Team Discussion

✓ 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		✓	👍	?
	Reporting	UHV		✓	👍	✓
CMR-00159 z159	Reporting	UHM		✓	👍	✓
CMR-00158 z158	Reporting	UHM		✓	👎	

1 - 5

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

Requesting Campus:

Business Area:

Request:

Note: to remove filtering, set the Quick Filter selection(s) to value "(Empty)" and then clear corresponding Column Filter selection(s)

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

Workflow/List Multi-View

4



- campus.
- o **Red Thumbs-Down:** Indicates that workstep was of type Approval/Disapproval and the AVP/Designee has 'Not Approved' the request for his/her campus.
- o **Red 'X':** Indicates the requestor cancelled the request.
- o **Blank:** Indicates an action is not expected for that workstep.

5

FAQs

The "[FAQs](#)" Quick Launch Link directs you to a list of Frequently Asked Questions.

<p>Enhancements</p> <ul style="list-style-type: none"> ERBC WorkCenter Enhancement Requests Summary Workflow Workflow/List Multi-View <li style="background-color: #fff9c4;">FAQs Definition of Terms EMPS/ES Assignments Module Campus Defaults ERBC Discussions Sub-Module Lookup <p>EMPS Discussions</p> <ul style="list-style-type: none"> Team Discussion 		<div style="text-align: center;"> <p>Frequently Asked Questions</p> </div> <p>When will the Change Management team meet? The Change Management team generally meets every Tuesday for business review, the Change Management team generally meets every Tuesday.</p> <p>How long will the entire process take before development work can start after the initiating user request? It is expected that through collaboration between the requestor and AVP/Designee, an appropriate time frame will be determined, but the request will be reviewed exclusively at the discretion of the AVP/Designee and requestor.</p> <p>Once AVP/Designee approval is provided in SharePoint for the request, users can expect approximately six days for Change Management review on the next available regularly scheduled Tuesday meeting. The approximate six days cycle includes the AVP/Designee initial review and forwarding for Other UHS Campuses Review, three days for Other UHS Campuses Review, and one day for the request to be scheduled for the next available Tuesday meeting.</p> <p>If the Change Management recommendation for the request is that a modification be performed, the business case will be reviewed and then follow the normal procedures for placing the request on the module request log and prioritizing the work. Once the request is placed on the log, the actual development work to begin.</p>
---	--	---

5

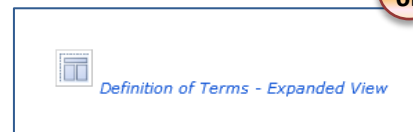


6 Definition of Terms

The “[Definition of Terms](#)” Quick Launch Link directs you to a list of defined terms. The page defaults to a ‘Collapsed View’ of the terms; to view an expansion of all the terms click on the “Definition of Terms - Expanded View” command at the top right of the page. You can toggle between the Collapsed view and Expanded view by clicking on the command in the upper right corner of the page. To view the definition of a single term, click on the term to open its item view.

6a

6b



7 EMPS/ES Assignments

The “[EMPS/ES Assignments](#)” Quick Launch Link directs you to the list of EMPS/ES default assignments. These assignments default to enhancement requests per the applicable business area through workflow. Use of the defaults reduces the manual data entry users would be required to perform. These defaults can be overwritten on the request if needed.

Edit	Category	Tier	Primary
	Academic Advising	Primary	Lee, Sara
	Admissions	Primary	Gantt, Alicia J
	Campus Community	Primary	Triantoro, Riod
	Financial Aid	Primary	Handy, Mark A
	Security	Primary	Coleman, Marie
	SEVIS	Primary	Saeed, Javaria
	Student Financials	Primary	Triantoro, Riod
	Student Records	Primary	Mills, Shane G
	Student Recruiting	Primary	Nguyen, Nhi Q
		Primary	Chaney, Jacqu

7



8 Module Campus Defaults

The “[Module Campus Defaults](#)” Quick Launch Link directs you to the list of business area campus default assignments (Business Owner, AVP/Designee, etc.). These assignments default to enhancement requests per the applicable business area through workflow. Use of the defaults reduces the manual data entry users would be required to perform. These defaults can be overwritten on the request if needed.

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 EMPS Discussions Team Discussion		Reporting	CB	UHM	Moreno, Susan E
		Reporting	CB	UHV	UHM/WORTHAMT
		Reporting	Facilities	UHCL	Washington, Mary A
		Reporting	Facilities	UHM	Wanjagi, Lillian W
		Reporting	Facilities	UHV	Bures, Veronica D.
		Reporting	Facilities	UHV	Bures, Veronica D.

9 ERBC Discussions

The “[ERBC Discussions](#)” Quick Launch Link directs you to the list of posted ERBC discussions. The ERBC discussion board provides a chronological central posting board for process players to engage in collaborative discussions related to requested enhancements. Users can post a new discussion thread or reply to existing posts.

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 EMPS Discussions Team Discussion						
		Created By	Replies	Last Updated	Distribution	Enhancement Request
	Test	Coleman, Marie A	0	8/29/2012 9:57 AM	Coleman, Marie A	CMR-00002 z2



10 **Sub-Module Lookup**

The “[Sub-Module Lookup](#)” Quick Launch Link directs you to the list of sub-modules within a business area. This list facilitates the lookup of default module campus assignments.

Enhancements			
ERBC WorkCenter			
Enhancement Requests			
Summary Workflow			
Workflow/List Multi-View	📄	Edit	Module
FAQs	📄		Reporting
Definition of Terms	📄		Reporting
EMPS/ES Assignments	📄		Reporting
Module Campus Defaults	📄		Student Financials
ERBC Discussions	📄		
Sub-Module Lookup		Sub-Module Lookup	
EMPS Discussions			
Team Discussion			

10



ERBC Processing

Navigating the Online Form

1 Form Data Entry (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. This is the only view that allows for data entry of the request; all other views in the form are display only and depict various task and summary status information related to the life cycle of the request.


The “Form Request” default view contains eight sections:


- **Section I – Proposed Enhancement Information:** In section one of the Form Request view, users populate background information for the proposed enhancement. Requesting Campus review and requesting AVP/Designee approval statuses are also populated in this section. User/Participant fields are generally populated by workflow, but can be manually overwritten if desired.

1a



UHS Enhancement Request Business Case





Associated Tasks | Summary Statuses | Summary Workflow

Section I – Proposed Enhancement Information:

Enhancement Request Title:	Create New CB123 State Report		
Prepared By:	Coleman, Marie A ;	Requesting Campus:	UHV
Business Area / Sub-Module:	Reporting / IR	Date Desired in Production:	12/29/2012
Type / Category / Resources:	Enhancement Type 1: <input type="checkbox"/> Administrative <input type="checkbox"/> Self-Service	Enhancement Type 2: <input type="checkbox"/> Federal <input checked="" type="checkbox"/> State <input type="checkbox"/> Institutional	Enhancement Category: <input type="checkbox"/> Preventative <input type="checkbox"/> Corrective <input checked="" type="checkbox"/> Expansion
	Developer Resources to be Used: <input checked="" type="checkbox"/> UHS Developer <input type="checkbox"/> Campus Developer		
Description of Request:	THECB has issued a memorandum informing public universities will be required to submit new CB123 report beginning Fall 2014.		
Current Business Practice:	N/A, this is a new requirement.		



- **Section II – Other UHS Campuses, EMPS, and ES Development Review:** Section two of the Form Request view is used for populating EMPS/ES related information and for populating Other UHS Campuses review and AVP/Designee approval statuses. User/Participant fields are generally populated by workflow, but can be manually overwritten if desired.
- **Section III – Change Management Review:** Section three of the Form Request view is used for populating change management review schedules and anticipated meeting participants. User/Participant fields are generally populated by workflow, but can be manually overwritten if desired.
- **Section IV – Reviewers' Recommendations (Completed by Change Management Team):** Section four of the Form Request view is used for populating change management review recommendation options.
- **Section V – Support for Change Management Team's Recommendation:** Section five of the Form Request view is used for populating supporting information related to the recommendation options.
- **Section VI – Recommended Enhancements:** Section six of the Form Request view is used for populating the final recommendation selected from amongst

1b

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

ES Manager Review:

Review:	
ES Manager	Moreno, Leo E ; <input type="button" value="Reset"/> <input type="button" value="Save"/> Reviewed
Estimated Development Hours	80
ES Developer (if Campus Developer not assigned)	Culberson, Annette ; <input type="button" value="Reset"/> <input type="button" value="Save"/>
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:

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

Review:					
EMPS Analyst	Coleman, Marie A ; <input type="button" value="Reset"/> <input type="button" value="Save"/> Not Reviewed				
Review Type	For Documentation Purposes Only				
Campus(es) and Module(s) Affected	<table border="0"> <tr> <td>Campus(es) Affected:</td> <td>Module(s) Affected:</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>	Campus(es) Affected:	Module(s) Affected:	<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
Campus(es) Affected:	Module(s) Affected:				
<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.				

UHCL Campus Review:

(Ignore this section if you are the Requesting Campus):

Review:	
Business Owners(s)	Ustov, Cynthia A ; <input type="button" value="Reset"/> <input type="button" value="Save"/> Not Reviewed
Campus Functional Analyst(s)	<input type="button" value="Reset"/> <input type="button" value="Save"/> Not Reviewed
Campus Developer	<input type="button" value="Reset"/> <input type="button" value="Save"/> Not Reviewed



- the various options presented.
- **Section VII – Attachments:** Section seven of the Form Request view is used for attaching supporting documents to the enhancement request.
- **Bottom Section:** The bottom section of the Form Request view is used for populating the eventual CSR number created for requests having a recommendation that dictates the creation of a CSR, and for displaying the request status and summary audit information.

1d

Section VI – Recommended Enhancements:

Recommendation: Recommendation Completed: ▾

Perform the requested enhancement.

Section VII – Attachments:

Attachments:

Request Number: CMR-00163 **CSR Number:** CSR 99999

Request Number: CMR-00163 z163
Created: 12/10/2012 02:52:43 PM by Coleman, Marie A
Last modified: 12/10/2012 02:55:34 PM by Coleman, Marie A

Request Status: Document Preparation

1c

Section III – Change Management Review:

Change Management Review: CM Review Meeting Date/Time: 11/05/2012 5:00 PM [View Scheduled ERBC Meetings](#)
[Open Associated Calendar Item](#)

Request Presenter(s): Coleman, Marie A ;

Review:			
EMPS Director	Coleman, Marie A ;	<input type="button" value="i"/> <input type="button" value="u"/>	Not Reviewed ▾
ES Director(s)	Coleman, Marie A ;	<input type="button" value="i"/> <input type="button" value="u"/>	Not Reviewed ▾
Campus Functional Analyst(s)	Coleman, Marie A ;	<input type="button" value="i"/> <input type="button" value="u"/>	Not Reviewed ▾
Campus/ES Developer(s)		<input type="button" value="i"/> <input type="button" value="u"/>	Not Reviewed ▾
Campus Lead(s)	Coleman, Marie A ;	<input type="button" value="i"/> <input type="button" value="u"/>	Not Reviewed ▾
Technical Manager(s)	Coleman, Marie A ;	<input type="button" value="i"/> <input type="button" value="u"/>	Not Reviewed ▾
EMPS Analyst(s)	Coleman, Marie A ;	<input type="button" value="i"/> <input type="button" value="u"/>	Not Reviewed ▾

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

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.



2 Associated Tasks (Display Only View)




The “Associated Tasks” view is a display only view used to coordinate task information related to the request. The view lists each task created against a request, with supporting task information such as:

- The task ID
- The task status
- Who was assigned the task
- The task due date
- The date the task was completed
- Who completed the task





2



UHS Enhancement Request Business Case

Associated Tasks:

Task ID	Task	Status	Assigned To	Due Date	Date Completed	Save Current Updates!!!	Task Navigation Link <small>(Link is available only if associated Form Edits have been saved)</small>
980	Forward Request For Other UHS Campuses Rev...	Completed	Coleman, Marie A	11/05/2012 2:58 PM	11/05/2012 2:54 PM by Coleman, Marie A		Click to Complete/Open Task
981	Other UHS Campuses Review (3 Days)	Completed	Coleman, Marie A	11/05/2012 3:01 PM	11/05/2012 3:02 PM by Coleman, Marie A		Click to Complete/Open Task
982	Appoint Change Management Meeting	Completed	Coleman, Marie A	11/05/2012 3:08 PM	11/05/2012 3:05 PM by Coleman, Marie A		Click to Complete/Open Task
983	Provide Recommendation for Request	Completed	Coleman, Marie A	11/05/2012 4:10 PM	11/05/2012 3:08 PM by Coleman, Marie A		Click to Complete/Open Task

Request Number: CMR-00154 z154
 Created: 11/05/2012 02:45:05 PM by Coleman, Marie A
 Last modified: 11/05/2012 03:09:02 PM by Coleman, Marie A

Request Status: Recommendation Completed




3 Summary Statuses (Display Only View)

The "Summary Statuses" view is a display only view used to highlight:

- o Campus Approval statuses
- o Key Milestone Statuses
 - Requesting Campus Review Status
 - EMPS Analyst Review Status
 - Other UHS Campus(es) Review Status
 - Change Management Updates
 - CM Review Meeting Date/Time
 - Request Status
 - Recommendation

3



UHS Enhancement Request Business Case

InfoPath Form Request
 Associated Tasks
 Summary Workflow

SUMMARY STATUSES

Campus Approvals:

Campus	AVP/Designee	Status	UserID Updated By	Date Updated
Requesting Campus: UHM	Coleman, Marie A	Approved	macolem3	Monday, November 05, 2012 12:19 PM
UHCL				
UHD				
UHM				
UHV	Coleman, Marie A	Approved	macolem3	Monday, November 05, 2012 12:28 PM

Milestone Statuses:

Process Milestone	Status
Requesting Campus Review Status:	Approved
EMPS Analyst Review Status:	Completed
Other UHS Campus(es) Review Status:	Review has EXPIRED (Begin 11/5/2012 12:27 PM; End 11/5/2012 12:33 PM)
Change Management Updates:	Recommendation Completed
CM Review Meeting Date/Time:	Monday, November 05, 2012 1:00 PM
Request Status:	Recommendation Completed
Recommendation:	Coleman, Marie A Use delivered functionality 11/5/2012 12:46:43 PM



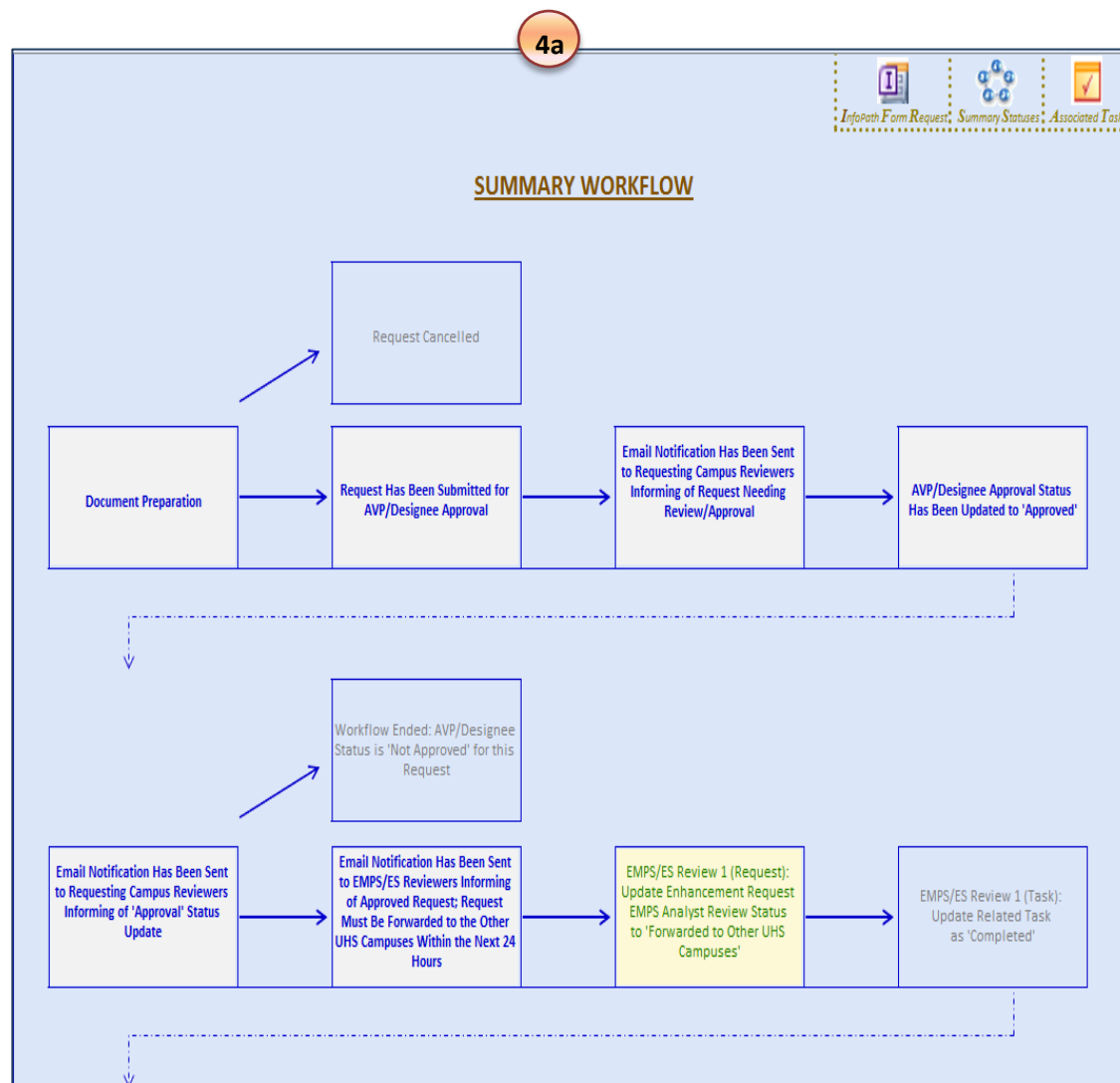
4 Summary Workflow** (Display Only View)

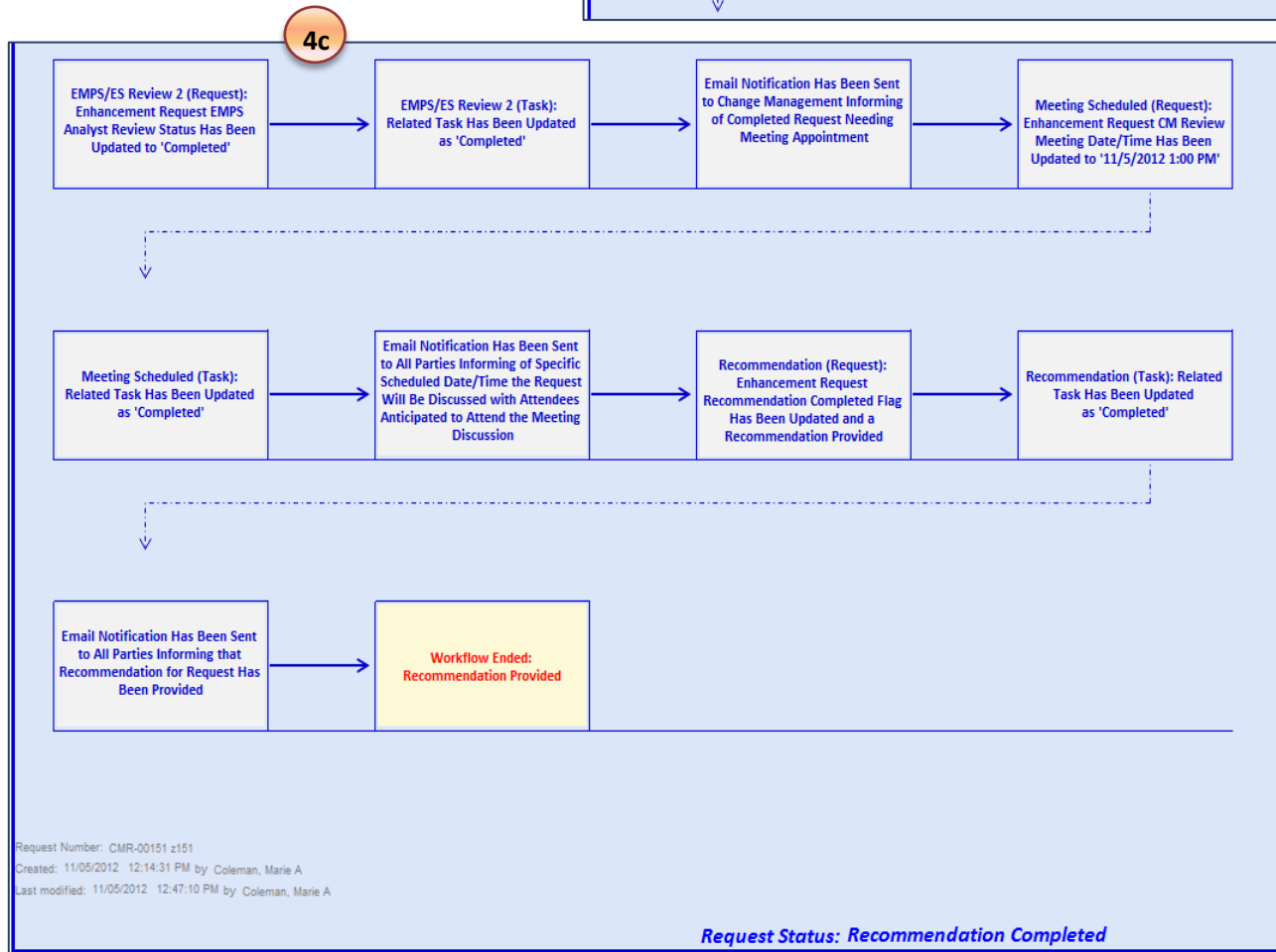
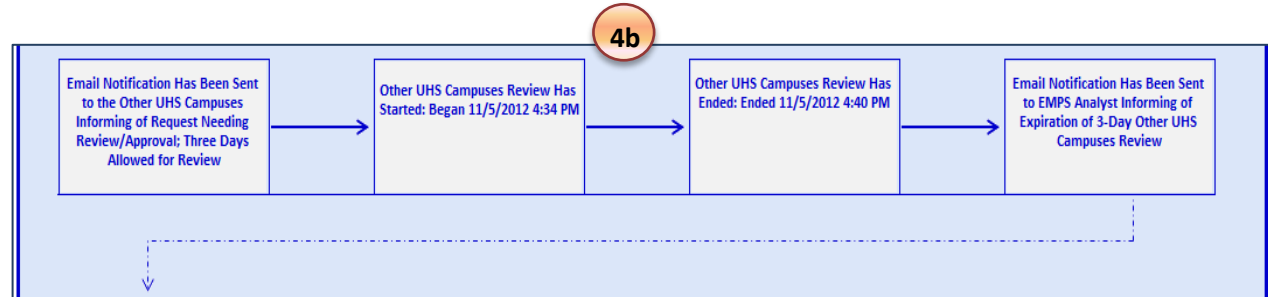
The “**Summary Workflow**” view is a display only view used to walk the user through the major worksteps that must be performed for that particular request, presented in a simple graphical left-to-right and bottom-down flow of worksteps.

The flow starts at the “Document Preparation” workstep and progresses through the life cycle of the request until a termination workstep is reached, ending the life cycle of that request. Termination worksteps include cancellation of the request, disapproval of the requesting campus AVP/Designee, or the recommendation being completed for the request.

Legend:

- **Light Yellow Box with Green Text:** indicates it is the current **Active** workstep and is pending completion.
- **Light Gray Box with Blue Text:** indicates it is a **Non-active** workstep that has achieved completion.
- **Light Yellow Box with Red Text:** indicates it is a **Termination** workstep and represents the end of the life cycle of the request.
- **Light Blue Box with Gray Text:** indicates a general workstep within the possible routes of flow of the request’s life cycle.





Request Number: CMR-00151 z151

Created: 11/05/2012 12:14:31 PM by Coleman, Marie A

Last modified: 11/05/2012 12:47:10 PM by Coleman, Marie A



5 Workflow Processing Message (Display Only View)

The “**Workflow Processing**” view is a display only view used to inform users trying to access the request that workflows are currently running in the background against the item. To mitigate edit conflicts between manual updates by users and automated updates by workflow, the “**Workflow Processing**” message appears and prevents users from making edits to the item until after the automated workflows have completed their current instance of processing. Users can still access the “**Associated Tasks**”, “**Summary Statuses**”, and “**Summary Workflow**” display only views to review status information related to the request by clicking on the appropriate command button at the bottom of the message.




Note: as with any process that runs over servers, there can be timing delays with instances queued to run depending on the traffic and availability of the server; on average, workflow instances generally take one to ten minutes to initiate and complete its run during the normal operations of the current SharePoint workflow servers. 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.

5

Edit
Save Close Paste Cut Delete Item
Commit Clipboard Actions Views

Current View:



UHS Enhancement Request Business Case

Message

This form is currently being edited by automatic workflows on the server. Please close the form and wait approximately five to ten minutes until current workflow edits have completed running on the server, after which you may reopen the list item and make your manual updates to the form. You can contact the EMPS Analyst that supports your business area if you have questions or need further assistance.

OK

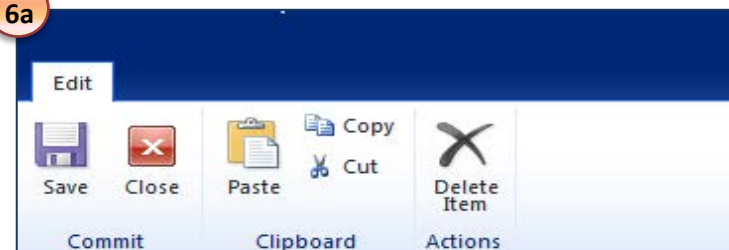
Tasks
Statuses
Workflow



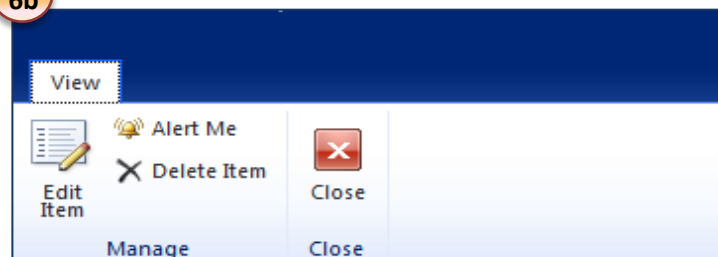
6 InfoPath Application Menu Ribbon

The custom online form used for the data entry and viewing of enhancement requests SharePoint items is an InfoPath-based tool. At the top of all views is the InfoPath application Menu Ribbon. In 'Edit Item' mode the ribbon provides commands for Saving the item, Closing the item, Pasting text, Copying text, Cutting text, and Deleting the item. In 'View Item' mode the ribbon provides commands for Editing the item, creating an Alert, Deleting the item, and Closing the item.

6a



6b



7 View Command Bar

In addition to commands available on the InfoPath application Menu Ribbon, each view also has a "View Command Bar" located in the top right area of the view page. It provides commands, displayed as icons, that when selected navigates the user to one of the other views than the one currently open.

The available command icons displayed depend on the view that is currently open.



7



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.

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, at the top left of the page above the 'Enhancement Requests - Filtered Views Collection' web part. Click on the "Enhancement Request Business Case" link to initiate creation of the new request.
- Through the "Add New Item" command link. The link appears both on the **ERBC WorkCenter** repository page, below the 'Enhancement Requests - Filtered Views Collection' web part; as well as on the **Enhancement Requests Quick Launch** list page at the bottom of the page views. Click on the "Add New Item" command link to initiate creation of the new request.
- Also from the **Enhancement Requests Quick Launch** list page menu ribbon, the "New Item" command can be used.

>>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: Enhancement Request Business Case

Create a new enhancement request: Enhancement Request Business Case

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

1a

Create a new enhancement request: Enhancement Request Business Case

All Requests | Approval-UHCL | Approval-UHD | Approval-UHM | Approval-UHV
 Pending-CM (Documentation) | Pending-CM (Formal)

Recommendations

Request Number	Business Area
Count= 65	
CMR-00160	Reporting
CMR-00159	Reporting
CMR-00154	Reporting
CMR-00153	Reporting
CMR-00152	Reporting
CMR-00151	Reporting
CMR-00147	Security
CMR-00146	Campus Community
CMR-00145	Security
CMR-00144	Reporting

Add new item

Command

1b

List Tools

Site Actions | Browse | Items | List

New Item | New Folder | View Item | Edit Item | Delete Item | Attach File

New Item | Request Number | CMR-00164

Command

1c



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.

a.) **Section I – Proposed Enhancement Information:**
In section one of the Form Request view, users populate background information for the proposed enhancement. User/Participant fields are generally populated by workflow, but can be manually overwritten if desired.

The Preparer has the option to prepare the document over time instead of having to complete all of Section I information at the time of initiating the request. The document is kept in a “**Document Preparation**” status until the Preparer is ready to formally submit the request for requesting campus review and AVP/Designee approval. At a minimum, the below fields are **Required Fields** that must be populated before an initial **Save** is allowed of the document; they are indicated by a red asterisk that appears in the field:

- Enhancement Request Title (must be unique)
- Requesting Campus
- Business Area
- Sub-Module (if applicable for the business area)
- Date Desired in Production

2a

2b



c.) The 'Requesting Campus Required Review' area of this section contains link 'View Module Campus Defaults' that if clicked will navigate the user to the list **Module Campus Defaults**. You can review the list to confirm if the defaults are appropriate. If the defaults are appropriate, there is no need to manually populate the list of users in this area; however if not appropriate, the user can manually select the appropriate users for this area.

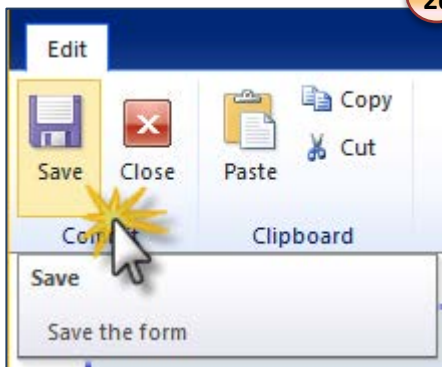
When ready to formally submit the request for requesting campus review and AVP/Designee approval, update the **Requesting Campus Review Status** to "Submitted for AVP Approval".

d.) For all updates made to the request, make sure to **Save** the document.

2c

Risk/Impact of not performing the Proposed Enhancement:					
Potential Cost Saving:					
Proposed Enhancement and Alternatives:	<u>Option:</u>	<u>Proposed Enhancement and Alternatives:</u>	<u>Estimated Manual Hours:</u>	<u>Number of Students Affected:</u>	<u>Number of Administrative Users Affected:</u>
	1	Perform proposed enhancement...			
	2	Continue with current business practice...			
	3				
	Upcoming Oracle Improvements				
Requesting Campus Required Review:	Requesting Campus Review Status:	Document Preparation	View Module Campus Defaults		
	Request Presented By:	<input type="text"/>			
<u>Review:</u>					
Business Owners(s)	<input type="text"/>			Not Reviewed	<input type="button" value="v"/>
Campus Functional Analyst(s)	<input type="text"/>			Not Reviewed	<input type="button" value="v"/>
Campus Developer (if to be assigned)	<input type="text"/>			Not Reviewed	<input type="button" value="v"/>
Campus Lead(s)	<input type="text"/>			Not Reviewed	<input type="button" value="v"/>
AVP(s) or Designee(s)	<input type="text"/>			Not Reviewed	<input type="button" value="v"/>
Requesting Campus Comments	<input type="text"/>				

2d





Requesting Campus Review

The next phase of the enhancement request life cycle is Requesting Campus Review.

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.



a.) **Checking for Items in the AVP/Designee's Queue:** In addition to retrieving an item that is pending approval/disapproval by the AVP/Designee from email notification, 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.

- o **Approval-UHCL:** use this tab to quickly see requests needing UHCL AVP/Designee review and approval, and to select desired items for editing.
- o **Approval-UHD:** use this tab to quickly see requests needing UHD AVP/Designee review and approval, and to select desired items for editing.
- o **Approval-UHM:** use this tab to quickly see

1

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 with your campus reviewers and update the SharePoint item with your applicable review, approval, or disapproval status.

Request
[CMR-00164](#): Ceate New CB456 State Report

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

Link to Open the Item

1a

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

Approval-UHV

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

Enhancement Requests Filtered Views Collection



requests needing UHM AVP/Designee review and approval, and to select desired items for editing.

- **Approval-UHV:** use this tab to quickly see requests needing UHV AVP/Designee review and approval, and to select desired items for editing.

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.

2

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.	

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.

3

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.



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.

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 Check the 'Summary Workflow' () view first after opening the item. It is best to always check the **Summary Workflow** prior to making updates, especially if you mistakenly select the wrong item to edit. Checking the **Summary Workflow** serves the below objectives:

- To double-check for yourself where that particular request is in the process life cycle
- To double-check what action is currently expected to take place for that particular request
- To clarify what workstep is next in the process after you complete your current action



From: EMPS <sharepoint@uh.edu> **Sent:** Tue 12/11/2012 4:26 PM

To: Coleman, Marie A

Cc: Coleman, Marie A

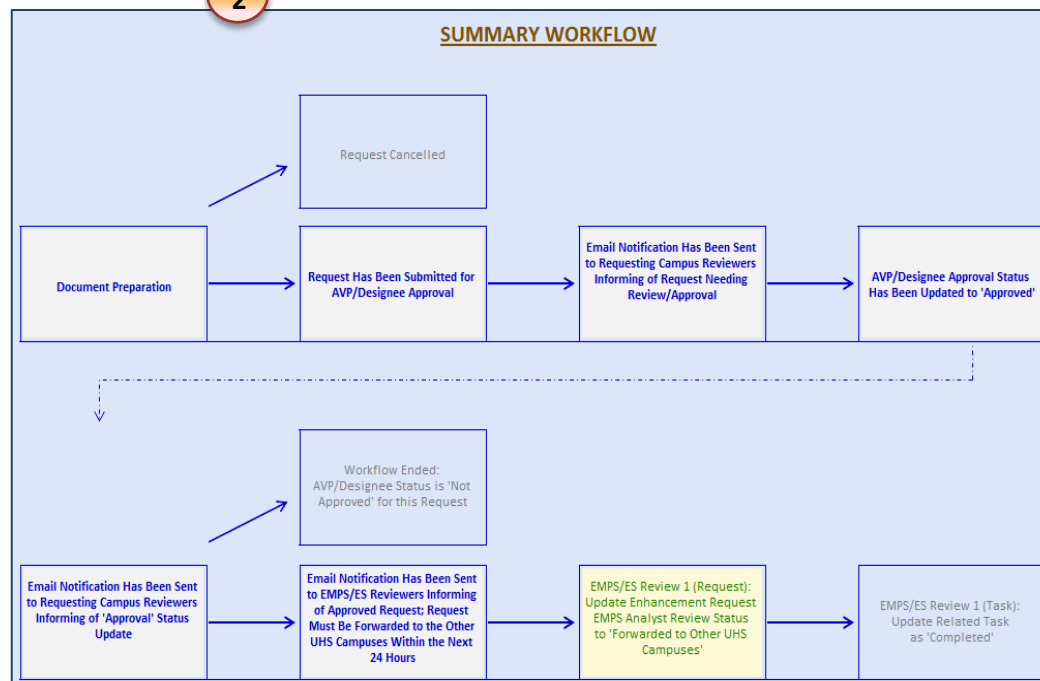
Subject: Notification of Enhancement Request CMR-00164: Ceate New CB456 State Report

1

An enhancement request for business area Reporting has been submitted by Coleman, Marie A and approved by Coleman, Marie A. The request has been assigned to you for EMPS/ES review. Please review the request and update the SharePoint item accordingly. Please ensure the request is forwarded for other UHS campuses review within the next 24 hours; a new task (assigned to Coleman, Marie A) has been created with a due date/time of Tuesday, December 11, 2012 4:19 PM.

Request
CMR-00164: Ceate New CB456 State Report

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





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.

The ES Technical Manager should ensure the Estimated Development Hours, ES Developer assignment (if applicable), and Review Status fields are updated.

The EMPS Analyst should ensure the Review Type, Campuses/Modules Affected, and Review Status fields are updated. The EMPS Analyst Review Status should specifically be updated to **“Forwarded to Other UHS Campuses”**.



Note: this workstep and completion of the associated Task should be completed within 24 hours. An Escalation notification will be generated for items not completed within 24 hours.

3


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


ES Manager Review:					
<u>Review:</u>					
ES Manager	Coleman, Marie A ; 🔍 📄 Reviewed ▼				
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>					
<u>Review:</u> Go To 'Associated Tasks' view to Save Edits and Complete Task					
EMPS Analyst	Coleman, Marie A ; 🔍 📄 Forwarded to Other UHS Campuses ▼				
Review Type	For Formal Review ▼				
Campus(es) and Module(s) Affected	<table border="0"> <tr> <td><u>Campus(es) Affected:</u></td> <td><u>Module(s) Affected:</u></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>	<u>Campus(es) Affected:</u>	<u>Module(s) Affected:</u>	<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
	<u>Campus(es) Affected:</u>	<u>Module(s) Affected:</u>			
<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.				



4 For the EMPS Analyst, after selecting the review status “**Forwarded to Other UHS Campuses**”, a validation edit message will briefly appear prompting you that you must also complete the associated Task with this review status update.

Go To 'Associated Tasks' view to Save Edits and Complete Task

Click on the ‘Associated Tasks’ icon () to perform the remaining steps needed to complete the update:

- Click on the ‘Save’ icon (). This saves the recent edits you’ve made on the form.
- Click on the hyperlink that appears after successfully saving the edits on the form: “[Click to Complete/Open Task](#)”.
- You will be directed to the Task completion prompt page. Click on the button “**Complete Task**”.


Complete Task

You can close the internet windows that were opened.

4a

InfoPath Form Request | Summary Statuses | Summary Workflow


Associated Tasks:

Task ID	Task	Status	Assigned To	Due Date	Date Completed	Save Current Updates!!!	Task Navigation Link
1,082	Forward Request For Other UHS Campuses Rev...	In Progress	Coleman, Marie A	12/11/2012 4:19 PM			Click to Complete/Open Task

4b

InfoPath Form Request | Summary Statuses | Summary Workflow

Associated Tasks:

Task ID	Task	Status	Assigned To	Due Date	Date Completed	Save Current Updates!!!	Task Navigation Link
1,082	Forward Request For Other UHS Campuses Rev...	In Progress	Coleman, Marie A	12/11/2012 4:19 PM		 Form Saved	Click to Complete/Open Task

4c

Title: Assignment of Enhancement Request to EMPS Analyst

Description: You have been assigned as the EMPS analyst for this enhancement request. Please complete task: 'Forward Request for Other UHS Campuses Review'.

Complete Task Cancel



5

OTHER HELPFUL INFORMATION

a) **Checking for Items in the 'Pending-EMPS Analyst' Queue:** In addition to retrieving an item that is pending review from within the email notification, items needing review are also located on the ERBC WorkCenter repository page in the 'Enhancement Requests Filtered Views Collection' web part. EMPS Analysts can go there to quickly identify all items needing EMPS review to be completed by them.

- o **Pending-EMPS Analyst:** use this tab to quickly see requests needing EMPS Analyst review, and to select desired items for editing. The tab list can be filtered by Business Area to quickly identify pending items for a module.

b) **Checking for Items in the 'My Active Tasks' Queue:** Items needing EMPS review are also located on the ERBC WorkCenter repository page in the 'Tasks Filtered Views Collection' web part. EMPS Analysts can go there to quickly identify all items needing EMPS review to be completed by them.

- o **My Active Tasks:** use this tab to quickly see ERBC tasks that are in your personal queue for expected actions, and to select desired items for editing.

5a

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](#)

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

Pending-EMPS Analyst

Enhancement Request Title	Request Number	Date Desired in Production	Business Area
Count= 17			
Develop New xx5 State Report	CMR-00017	9/29/2012	
Create New IRxx Report	CMR-00027	10/13/2012	
z41	CMR-00041	10/15/2012	
z44	CMR-00044	10/16/2012	
z48	CMR-00048	10/20/2012	
z49	CMR-00049	10/20/2012	
z39	CMR-00039	10/26/2012	

Business Area dropdown menu:
 Ascending
 Descending
 Clear Filter from Business Area
 Financial Aid
Reporting
 Student Financials
 Student Recruiting

5b

My Active Tasks | All Active Tasks | **Tasks Filtered Views Collection**
 Tasks Due Today | Fast Due Tasks | All Tasks | See All Views

My Active Tasks

Title	Related Content	Assigned To	Due Date	Status
Count= 1				
Forward Request For Other UHS Campuses Review	Create New CB123 State Report	Coleman, Marie A	12/10/2012 1:22 PM	In Progress



Other UHS Campuses Review

Following EMPS/ES cursory review, the other UHS campuses review phase begins. This phase has an allotted three days.

1

After the EMPS Analyst updates the enhancement request for Other UHS Campuses review, Workflow sends an email notification to all other campuses populated in Section II of the form (the EMPS Analyst is cc'd on the notification). 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.



a.) **Checking for Items in the AVP/Designee's Queue:** In addition to retrieving an item that is pending approval/disapproval by the AVP/Designee from email notification, 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.

- **Approval-UHCL:** use this tab to quickly see requests needing UHCL AVP/Designee review and approval, and to select desired items for editing.
- **Approval-UHD:** use this tab to quickly see requests needing UHD AVP/Designee review and approval, and to select desired

Link to Open the Item

1

From: EMPS <sharepoint@uh.edu> Sent: Tue 12/11/2012 4:42 PM
 To: Coleman, Marie A
 Cc: Coleman, Marie A
 Subject: Other UHS Campuses Review Notification of Enhancement Request CMR-00164: Ceate New CB456 State Report

An enhancement request has been submitted by requesting campus UHV for business area Reporting. The request has completed initiating campus review and approval. The request has now been forwarded by the EMPS Analyst for your campus review, and approval to opt-in the request. Please consult with your campus reviewers and update the SharePoint item with your applicable review, approval, or disapproval status for your specific campus within the next 3 days.

A new task (assigned to Coleman, Marie A) has been created for the expiration of the other UHS campuses review cycle with a due date/time of 12/11/2012 4:46 PM.

Request
CMR-00164: Ceate New CB456 State Report

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

1a

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](#)

Enhancement Requests Filtered Views Collection

All Requests	Approval-UHCL	Approval-UHD	Approval-UHM	Approval-UHV	Not Submitted	Recommendations	See All Views																
Approval-UHV																							
<table border="1"> <thead> <tr> <th>Enhancement Request Title</th> <th>Request Number</th> <th>Date Desired in Production</th> <th>Business Area</th> </tr> </thead> <tbody> <tr> <td colspan="4">Count= 9</td> </tr> <tr> <td>Develop New xx5 State Report</td> <td>CMR-00017</td> <td>9/29/2012</td> <td>Reporting</td> </tr> <tr> <td>Develop New xx6 State Report</td> <td>CMR-00018</td> <td>9/29/2012</td> <td>Reporting</td> </tr> </tbody> </table>								Enhancement Request Title	Request Number	Date Desired in Production	Business Area	Count= 9				Develop New xx5 State Report	CMR-00017	9/29/2012	Reporting	Develop New xx6 State Report	CMR-00018	9/29/2012	Reporting
Enhancement Request Title	Request Number	Date Desired in Production	Business Area																				
Count= 9																							
Develop New xx5 State Report	CMR-00017	9/29/2012	Reporting																				
Develop New xx6 State Report	CMR-00018	9/29/2012	Reporting																				



items for editing.

- **Approval-UHM:** use this tab to quickly see requests needing UHM AVP/Designee review and approval, and to select desired items for editing.
- **Approval-UHV:** use this tab to quickly see requests needing UHV AVP/Designee review and approval, and to select desired items for editing.

2

Other UHS campuses review participants should meet to discuss the request. After collaborating on the proposed request and making a determination of whether your campus should be included in the enhancement, 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.

Other UHS Campuses are provided a three day grace period to conduct their reviews and update the request with their statuses.

Edit
Copy

Save Close Paste Cut

UHCL Campus Review: *(Ignore this section if you are the Requesting Campus);*

Review:

UHD Campus Review: *(Ignore this section if you are the Requesting Campus);*

Review:

UHV Campus Review: *(Ignore this section if you are the Requesting Campus);*

Review:

UHM Campus Review: *(Ignore this section if you are the Requesting Campus);*

Review:

Business Owners(s)	Coleman, Marie A ;	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Reviewed
Campus Functional Analyst(s)	Coleman, Marie A ;	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Reviewed
Campus Developer		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Not Reviewed
Campus Lead(s)	Coleman, Marie A ;	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Reviewed
AVP(s) or Designee(s)	Coleman, Marie A ;	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Approved
Campus Comments	Designee Marie Coleman has approved this request in the absence of the AVP.		

2


43 | 69



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.

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 Check the 'Summary Workflow' () view first after opening the item. It is best to always check the Summary Workflow prior to making updates, especially if you mistakenly select the wrong item to edit. Checking the Summary Workflow serves the below objectives:

- To double-check for yourself where that particular request is in the process life cycle
- To double-check what action is currently expected to take place for that particular request
- To clarify what workstep is next in the process after you complete your current action

Link to Open the Item

From: EMPS <sharepoint@uh.edu> Sent: Tue 12/11/2012 4:47 PM
 To: Coleman, Marie A
 Cc:
 Subject: 3-Day Period for Other UHS Campuses Review has Expired for Request 'Ceate New CB456 State Report'

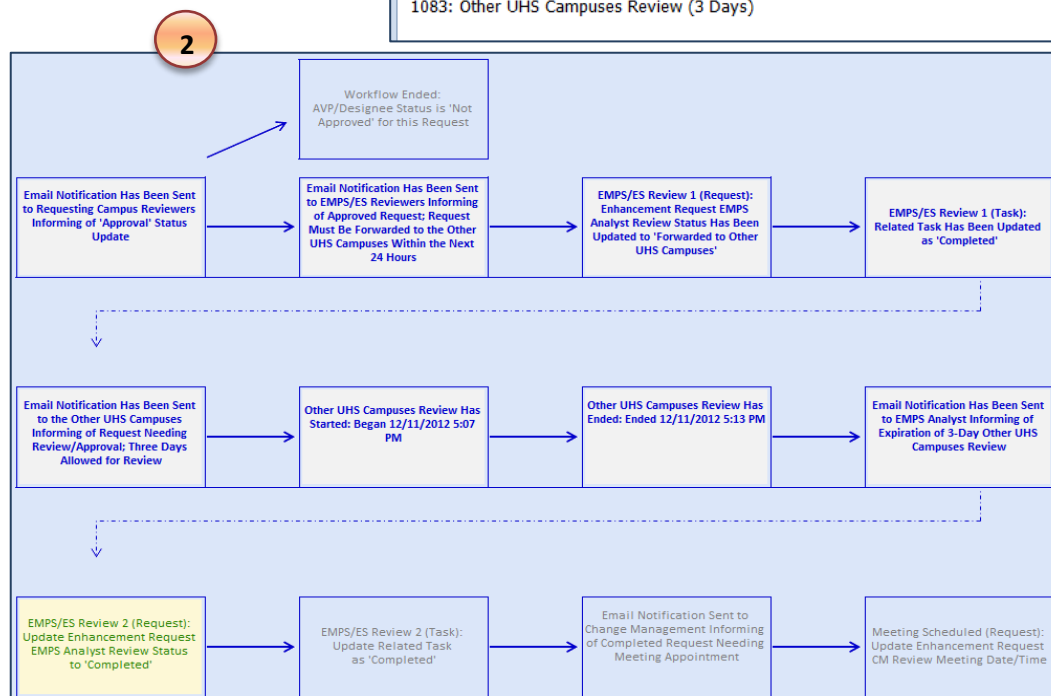
1

The 3-day other UHS campuses review cycle has ended. Your EMPS Analyst Review Status needs to be updated to 'Completed' for request '[Ceate New CB456 State Report](#)' and the associated task also needs to be updated as 'Completed'. Please update your review status for the request and the associated task to 'Completed' as soon as possible so that Change Management can schedule a business case review meeting.

Request
 CMR-00164: Ceate New CB456 State Report

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

Task
 1083: Other UHS Campuses Review (3 Days)





3 As part of your Final Review make sure to check that all pertinent information Change Management will need to conduct its review has been entered on the request: such as anticipated meeting participants (Section III), a complete Description, Current Practices, Delivered Solutions, Estimated Development work, Campuses Affected, Modules Affected, etc.

The EMPS Analyst should ensure the Review Type, Campuses/Modules Affected, and Review Status fields are appropriately updated. The EMPS Analyst Review Status should specifically be updated to **“Completed”**.



Note: this workstep and completion of the associated Task should be completed within 24 hours. An Escalation notification will be generated for items not completed within 24 hours.

3

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


Review: Go To 'Associated Tasks' view to Save Edits and Complete Task


EMPS Analyst	Coleman, Marie A ;	Completed
Review Type	For Formal Review	
Campus(es) and Module(s) Affected	Campus(es) Affected: <input checked="" type="checkbox"/> UHCL <input type="checkbox"/> UHD <input checked="" type="checkbox"/> UHM <input checked="" type="checkbox"/> UHV	Module(s) Affected: <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.		



4 After selecting the review status “**Completed**”, a validation edit message will briefly appear prompting you that you must also complete the associated Task with this review status update.

Go To 'Associated Tasks' view to Save Edits and Complete Task

Click on the ‘Associated Tasks’ icon () to perform the remaining steps needed to complete the update:

- Click on the ‘Save’ icon (). This saves the recent edits you’ve made on the form.
- Click on the hyperlink that appears after successfully saving the edits on the form: “[Click to Complete/Open Task](#)”.
- You will be directed to the Task completion prompt page. Click on the button “**Complete Task**”.



Complete Task

You can close the internet windows that were opened.

4a

InfoPath Form Request | Summary Statuses | Summary Workflow

Associated Tasks:

Task ID	Task	Status	Assigned To	Due Date	Date Completed	Save Current Updates!!!	Task Navigation Link <small>(Link is available only if associated Form Edits have been saved)</small>
1,082	Forward Request For Other UHS Campuses Rev...	Completed	Coleman, Marie A	12/11/2012 4:19 PM	12/11/2012 4:40 PM by Coleman, Marie A		Click to Complete/Open Task
1,083	Other UHS Campuses Review (3 Days)	In Progress	Coleman, Marie A	12/11/2012 4:46 PM	by		

4b

InfoPath Form Request | Summary Statuses | Summary Workflow

Associated Tasks:

Task ID	Task	Status	Assigned To	Due Date	Date Completed	Save Current Updates!!!	Task Navigation Link <small>(Link is available only if associated Form Edits have been saved)</small>
1,082	Forward Request For Other UHS Campuses Rev...	Completed	Coleman, Marie A	12/11/2012 4:19 PM	12/11/2012 4:40 PM by Coleman, Marie A		Click to Complete/Open Task
1,083	Other UHS Campuses Review (3 Days)	In Progress	Coleman, Marie A	12/11/2012 4:46 PM	by	 Form Saved	Click to Complete/Open Task

4c

Title:

Description:



5

OTHER HELPFUL INFORMATION

a) **Checking for Items in the 'Pending-EMPS Analyst' Queue:** In addition to retrieving an item that is pending review from within the email notification, items needing review are also located on the ERBC WorkCenter repository page in the 'Enhancement Requests Filtered Views Collection' web part. EMPS Analysts can go there to quickly identify all items needing EMPS review to be completed by them.

- o **Pending-EMPS Analyst:** use this tab to quickly see requests needing EMPS Analyst review, and to select desired items for editing. The tab list can be filtered by Business Area to quickly identify pending items for a module.

b) **Checking for Items in the 'My Active Tasks' Queue:** Items needing EMPS review are also located on the ERBC WorkCenter repository page in the 'Tasks Filtered Views Collection' web part. EMPS Analysts can go there to quickly identify all items needing EMPS review to be completed by them.

- o **My Active Tasks:** use this tab to quickly see ERBC tasks that are in your personal queue for expected actions, and to select desired items for editing.

5a

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](#)

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

Pending-EMPS Analyst

Enhancement Request Title	Request Number	Date Desired in Production	Business Area
Count= 17			
Develop New xx5 State Report	CMR-00017	9/29/2012	
Create New IRxx Report	CMR-00027	10/13/2012	
z41	CMR-00041	10/15/2012	
z44	CMR-00044	10/16/2012	
z48	CMR-00048	10/20/2012	
z49	CMR-00049	10/20/2012	
z39	CMR-00039	10/26/2012	

Business Area dropdown menu:
 Ascending
 Descending
 Clear Filter from Business Area
 Financial Aid
Reporting
 Student Financials
 Student Recruiting

5b

My Active Tasks | All Active Tasks | **Tasks Filtered Views Collection**
 Tasks Due Today | Fast Due Tasks | All Tasks | See All Views

My Active Tasks

Title	Related Content	Assigned To	Due Date	Status
Count= 1				
Forward Request For Other UHS Campuses Review	Create New CB123 State Report	Coleman, Marie A	12/10/2012 1:22 PM	In Progress




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.

1

1 After completion of the EMPS final review, 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 to perform the review and make updates to the request.

2 Check the 'Summary Workflow' () view first after opening the item. It is best to always check the Summary Workflow prior to making updates, especially if you mistakenly select the wrong item to edit. Checking the Summary Workflow serves the below objectives:

- To double-check for yourself where that particular request is in the process life cycle
- To double-check what action is currently expected to take place for that particular request
- To clarify what workstep is next in the process after you complete your current action

Link to Open the Item

From: EMPS <sharepoint@uh.edu> Sent: Tue 12/11/2012 5:10 PM
 To: Coleman, Marie A
 Cc: Coleman, Marie A
 Subject: Change Management Appointment Needed for Request: CMR-00164 - Ceate New CB456 State Report

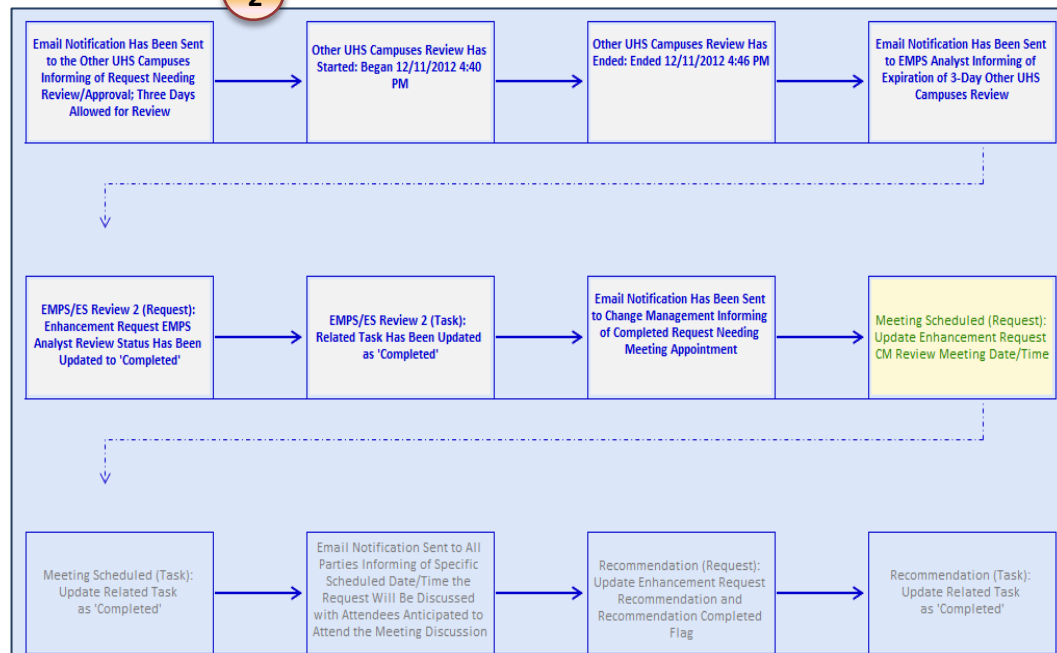
Request 'CMR-00164 - Ceate New CB456 State Report' has been updated to a campus(es) review status of 'Completed' by EMPS Analyst Coleman, Marie A.

Please update the request with the specific date/time this request will be scheduled for change management review. A SharePoint calendar entry will be automatically created followed by an email notification to users for the scheduled meeting once the request is updated. A new task (assigned to Coleman, Marie A) has also been created with a due date/time of Tuesday, December 11, 2012 5:11 PM; mark the task as complete when the request meeting date/time is updated.

Request (For Formal Review)
[CMR-00164: Ceate New CB456 State Report](#)

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

2





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 you are not choosing an appointment that conflicts with already scheduled items for that date.



Note: this workstep and completion of the associated Task should be completed within 24 hours. An Escalation notification will be generated for items not completed within 24 hours.

Section III - Change Management Review:

Change Management Review: Go To 'Associated Tasks' view to Save Edits and Complete Task

CM Review Meeting Date/Time: [View Scheduled ERBC Meetings](#) [Open Associated Calendar Item](#) **3** [Link to Calendar List](#)


Request Presenter(s):


Review:			
EMPS Director	<input type="text" value="Coleman, Marie A ;"/>		Not Reviewed
ES Director(s)	<input type="text" value="Coleman, Marie A ;"/>		Not Reviewed
Campus Functional Analyst(s)	<input type="text"/>		Not Reviewed
Campus/ES Developer(s)	<input type="text"/>		Not Reviewed
Campus Lead(s)	<input type="text" value="Coleman, Marie A ;"/>		Not Reviewed
Technical Manager(s)	<input type="text" value="Coleman, Marie A ;"/>		Not Reviewed
EMPS Analyst(s)	<input type="text" value="Coleman, Marie A ;"/>		Not Reviewed



4 After updating the meeting date/time, a validation edit message will briefly appear prompting you that you must also complete the associated Task with this review status update.

Go To 'Associated Tasks' view to Save Edits and Complete Task

Click on the 'Associated Tasks' icon () to perform the remaining steps needed to complete the update:

- Click on the 'Save' icon (). This saves the recent edits you've made on the form.
- Click on the hyperlink that appears after successfully saving the edits on the form: "[Click to Complete/Open Task](#)".
- You will be directed to the Task completion prompt page. Click on the button "[Complete Task](#)".

[Complete Task](#)

You can close the internet windows that were opened.

4a

InfoPath Form Request Summary Statuses Summary Workflow

Associated Tasks:

Task ID	Task	Status	Assigned To	Due Date	Date Completed	Save Current Updates!!!	Task Navigation Link <small>(Link is available only if associated Form Edits have been saved)</small>
1,082	Forward Request For Other UHS Campuses Rev...	Completed	Coleman, Marie A	12/11/2012 4:19 PM	12/11/2012 4:40 PM by Coleman, Marie A		Click to Complete/Open Task
1,083	Other UHS Campuses Review (3 Days)	Completed	Coleman, Marie A	12/11/2012 4:46 PM	12/11/2012 5:04 PM by Coleman, Marie A		Click to Complete/Open Task
1,084	Appoint Change Management Meeting	In Progress	Coleman, Marie A	12/11/2012 5:11 PM	by		

4b

InfoPath Form Request Summary Statuses Summary Workflow

Associated Tasks:

Task ID	Task	Status	Assigned To	Due Date	Date Completed	Save Current Updates!!!	Task Navigation Link <small>(Link is available only if associated Form Edits have been saved)</small>
1,082	Forward Request For Other UHS Campuses Rev...	Completed	Coleman, Marie A	12/11/2012 4:19 PM	12/11/2012 4:40 PM by Coleman, Marie A		Click to Complete/Open Task
1,083	Other UHS Campuses Review (3 Days)	Completed	Coleman, Marie A	12/11/2012 4:46 PM	12/11/2012 5:04 PM by Coleman, Marie A		Click to Complete/Open Task
1,084	Appoint Change Management Meeting	In Progress	Coleman, Marie A	12/11/2012 5:11 PM	by	 Form Saved	Click to Complete/Open Task

4c

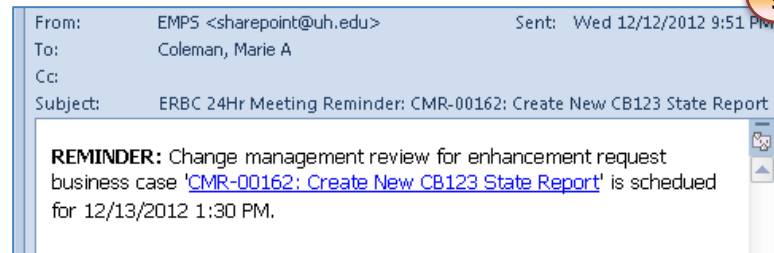
Title:

Description:



5

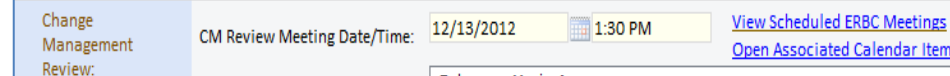
5 Meeting Reminders: A reminder notification will be sent to “identified attendees” 24 hours prior to when the enhancement request business case meeting is scheduled to occur.



6a

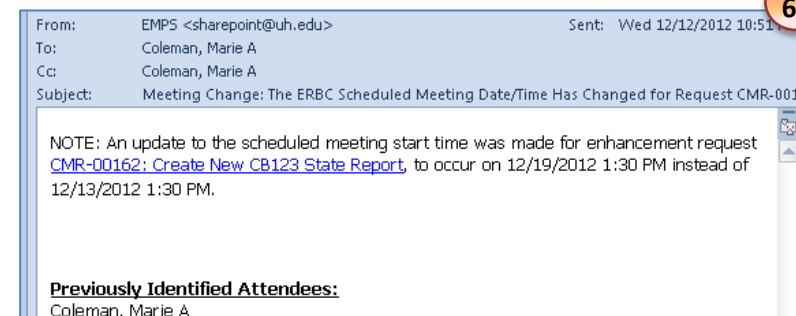
6 Changing a Previously Scheduled ERBC Meeting: A subsequent change to a previously scheduled change management review meeting must be made to the **Calendar** list item (not the Enhancement Request list item). You can open the **Calendar Item** from either within the Enhancement Request via the “**Open Associated Calendar Item**” link or by navigating to the Calendar list and opening the item from there. After you have updated the Calendar list item date/time and saved the edits, an email notification will automatically be sent to the Meeting Attendees informing them of the change. Workflow will also update enhancement request with the date/time change.

Section III – Change Management Review:



Link to Calendar Item

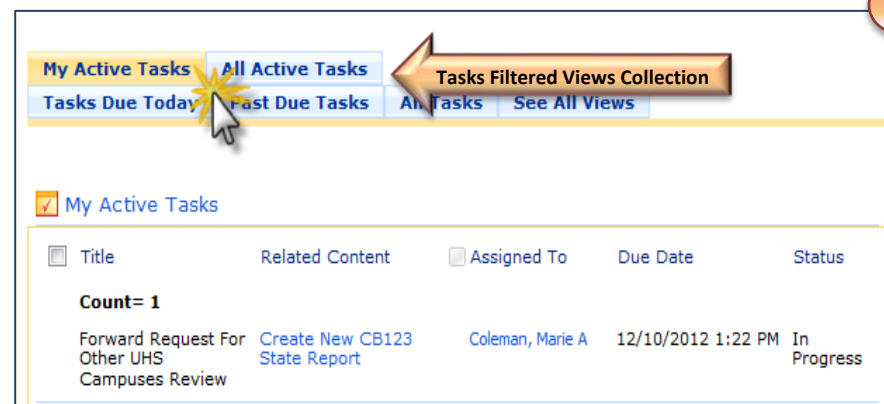
6b



7

7 OTHER HELPFUL INFORMATION: Checking for Items in the ‘My Active Tasks’ Queue: Items awaiting scheduling can also be identified via the **ERBC WorkCenter** repository page in the ‘**Tasks Filtered Views Collection**’ web part. The Scheduler can go there to quickly identify items to be scheduled.

- o **My Active Tasks:** use this tab to quickly see ERBC tasks that are in your personal queue for expected actions, and to select desired items for editing.






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.

1 After a change management meeting has been scheduled, 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 to make Recommendation updates to the request. At the conclusion of the change management meeting, EMPS Change Management should make the final updates to the enhancement request.

2 Check the 'Summary Workflow' () view first after opening the item. It is best to always check the Summary Workflow prior to making updates, especially if you mistakenly select the wrong item to edit. Checking the Summary Workflow serves the below objectives:

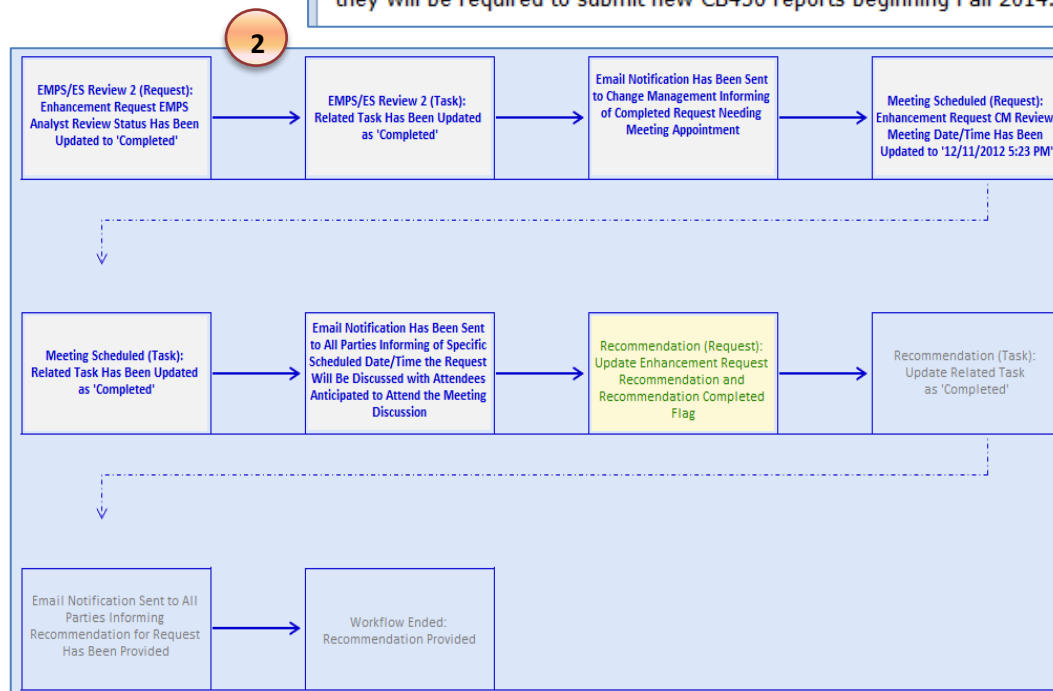
- To double-check for yourself where that particular request is in the process life cycle
- To double-check what action is currently expected to take place for that particular request
- To clarify what workstep is next in the process after you complete your current action

From: EMPS <sharepoint@uh.edu> Sent: Tue 12/11/2012 5:31 PM
 To: Coleman, Marie A **1**
 Cc: Coleman, Marie A
 Subject: Provide Recommendation for Request CMR-00164: Ceate New CB456 State Report

Please update request 'CMR-00164: Ceate New CB456 State Report' with a recommendation. A new task (assingned to Coleman, Marie A) has also been created with a due date/time of Tuesday, December 11, 2012 5:33 PM; mark the task as complete when the request recommendation is updated.

Request
[CMR-00164](#): Ceate New CB456 State Report

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





3 Sections IV, V and VI should be completed by EMPS Change Management. After the finalized Recommendation is entered, ensure to update the Recommendation Completed field to 'Yes'.



Note: this workstep and completion of the associated Task should be completed within 24 hours of the conclusion of the scheduled change management review meeting. An Escalation notification will be generated for items not completed within 24 hours.

3

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

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

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: Go To 'Associated Tasks' view to Save Edits and Complete Task


Recommendation: Recommendation Completed: Yes


Perform the requested enhancement



4 After updating the **Recommendation Completed** flag, a validation edit message will briefly appear prompting you that you must also complete the associated Task with this review status update.

Go To 'Associated Tasks' view to Save Edits and Complete Task




Click on the 'Associated Tasks' icon () to perform the remaining steps needed to complete the update:

- a.) Click on the 'Save' icon (). This saves the recent edits you've made on the form.
- b.) Click on the hyperlink that appears after successfully saving the edits on the form: "[Click to Complete/Open Task](#)".
- c.) You will be directed to the Task completion prompt page. Click on the button "**Complete Task**".





Complete Task

You can close the internet windows that were opened.




4a





Associated Tasks:

Task ID	Task	Status	Assigned To	Due Date	Date Completed	Save Current Updates!!!	Task Navigation Link <small>(Link is available only if associated Form Edits have been saved)</small>
1.082	Forward Request For Other UHS Campuses Rev...	Completed	Coleman, Marie A	12/11/2012 4:19 PM	12/11/2012 4:40 PM by Coleman, Marie A		Click to Complete/Open Task
1.083	Other UHS Campuses Review (3 Days)	Completed	Coleman, Marie A	12/11/2012 4:46 PM	12/11/2012 5:04 PM by Coleman, Marie A		Click to Complete/Open Task
1.084	Appoint Change Management Meeting	Completed	Coleman, Marie A	12/11/2012 5:11 PM	12/11/2012 5:27 PM by Coleman, Marie A		Click to Complete/Open Task
1.087	Provide Recommendation for Request	In Progress	Coleman, Marie A	12/11/2012 5:33 PM	by		

4b

Associated Tasks:

Task ID	Task	Status	Assigned To	Due Date	Date Completed	Save Current Updates!!!	Task Navigation Link <small>(Link is available only if associated Form Edits have been saved)</small>
1.082	Forward Request For Other UHS Campuses Rev...	Completed	Coleman, Marie A	12/11/2012 4:19 PM	12/11/2012 4:40 PM by Coleman, Marie A		Click to Complete/Open Task
1.083	Other UHS Campuses Review (3 Days)	Completed	Coleman, Marie A	12/11/2012 4:46 PM	12/11/2012 5:04 PM by Coleman, Marie A		Click to Complete/Open Task
1.084	Appoint Change Management Meeting	Completed	Coleman, Marie A	12/11/2012 5:11 PM	12/11/2012 5:27 PM by Coleman, Marie A		Click to Complete/Open Task
1.087	Provide Recommendation for Request	In Progress	Coleman, Marie A	12/11/2012 5:33 PM	by	 Form Saved	Click to Complete/Open Task

4c

Title	Provide Recommendation for Request
Description	Provide Recommendation for Request
<input type="button" value="Complete Task"/> <input type="button" value="Cancel"/>	



5 OTHER HELPFUL INFORMATION

a) **Checking for Items in the 'Pending-CM (Documentation)/(Formal)' Queue:** In addition to retrieving an item from within the email notification, items needing Recommendations are also located on the ERBC WorkCenter repository page in the 'Enhancement Requests Filtered Views Collection' web part. Change Management can go there to quickly identify items needing Recommendations.

- o **Pending-CM (Documentation):** use this tab to quickly see "For Documentation Only" requests needing Change Management completion, and to select desired items for editing.
- o **Pending-CM (formal):** use this tab to quickly see "For Formal Review" requests needing Change Management completion, and to select desired items for editing.

b) **Checking for Items in the 'My Active Tasks' Queue:** Items needing EMPS review are also located on the ERBC WorkCenter repository page in the 'Tasks Filtered Views Collection' web part. EMPS Analysts can go there to quickly identify all items needing EMPS review to be completed by them.

- a. **My Active Tasks:** use this tab to quickly see ERBC tasks that are in your personal queue for expected actions, and to select desired items for editing.

5a

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](#)

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

Pending-EMPS Analyst

Enhancement Request Title	Request Number	Date Desired in Production	Business Area
Count= 17			
Develop New xx5 State Report	CMR-00017	9/29/2012	
Create New IRxx Report	CMR-00027	10/13/2012	
z41	CMR-00041	10/15/2012	
z44	CMR-00044	10/16/2012	
z48	CMR-00048	10/20/2012	
z49	CMR-00049	10/20/2012	
z39	CMR-00039	10/26/2012	

Business Area dropdown menu:
 Ascending
 Descending
 Clear Filter from Business Area
 Financial Aid
Reporting
 Student Financials
 Student Recruiting

5b

Tasks Filtered Views Collection

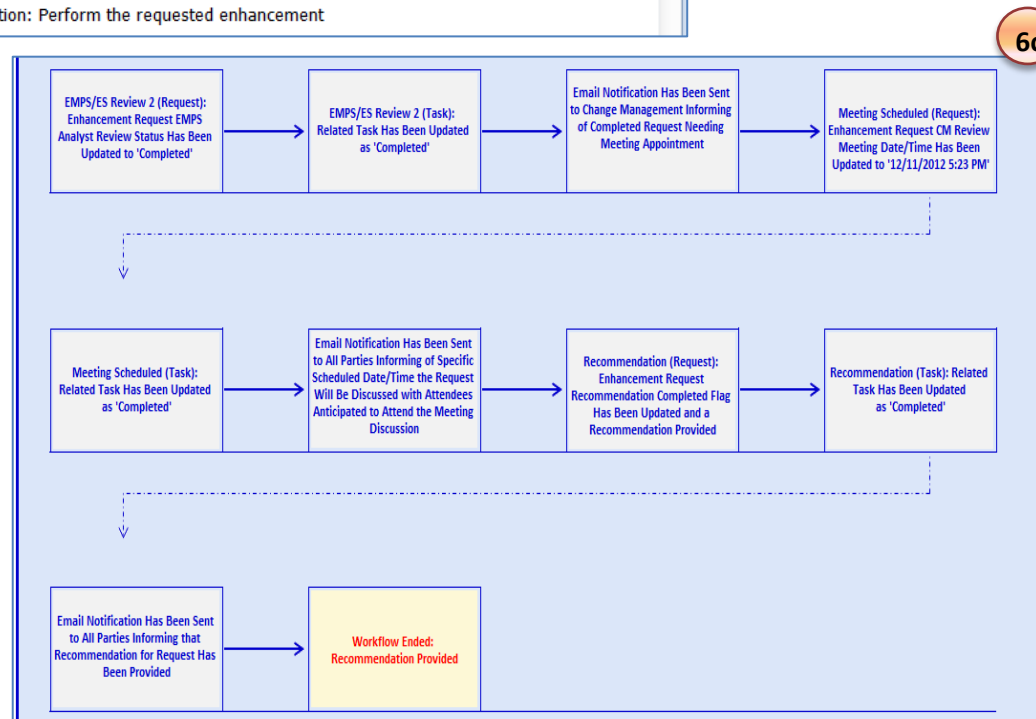
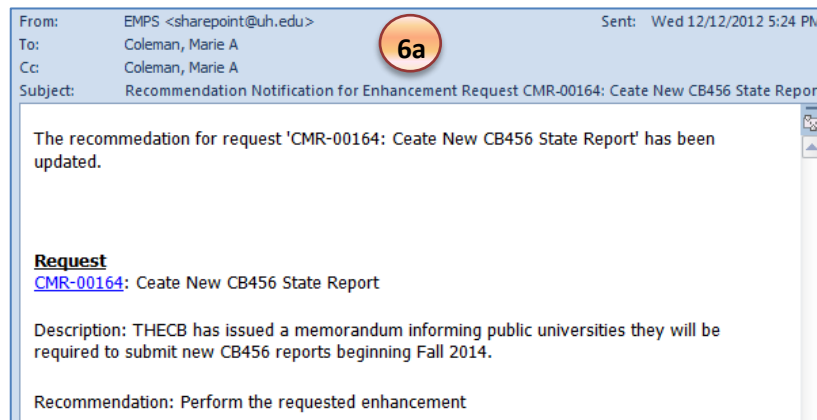
My Active Tasks | All Active Tasks
 Tasks Due Today | Past Due Tasks | All Tasks | See All Views

My Active Tasks

Title	Related Content	Assigned To	Due Date	Status
Count= 1				
Forward Request For Other UHS Campuses Review	Create New CB123 State Report	Coleman, Marie A	12/10/2012 1:22 PM	In Progress



- 6**
- a) After EMPS Change Management completes the Recommendation update on the enhancement request, Workflow sends a final email to all participants identified on the request informing them of the Recommendation that has been completed for the request.
 - b) The **Summary Statuses** InfoPath form view is updated with final milestones statuses of the request's process life cycle.
 - c) The **Summary Workflow** InfoPath form view is updated with the final process Termination workstep.



UHS Enhancement Request Business Case

6b

SUMMARY STATUSES

InfoPath Form Request, Associated Task, Summary Workflow

Campus Approvals:

Campus	AVP/Designee	Status	UserID Updated By	Date Updated
Requesting Campus: UHV	Coleman, Marie A	Approved	macolem3	Tuesday, December 11, 2012 4:09 PM
UHCL				
UHD				
UHM	Coleman, Marie A	Approved	macolem3	Tuesday, December 11, 2012 4:52 PM
UHV				

Milestone Statuses:

Process Milestone	Status
Requesting Campus Review Status:	Approved
EMPS Analyst Review Status:	Completed
Other UHS Campus(es) Review Status:	Review has EXPIRED (Begin 12/11/2012 4:40 PM; End 12/11/2012 4:46 PM)
Change Management Updates:	Recommendation Completed
CM Review Meeting Date/Time:	Tuesday, December 11, 2012 5:23 PM
Request Status:	Recommendation Completed
Recommendation:	Coleman, Marie A Perform the requested enhancement 12/12/2012 5:21:41 PM



Appendix

A. Workflow Notifications and Expected Actions

Notification	Example Body	Recipients	Actions to be Taken	Tag
Notification of Enhancement Request [ID]: [Title]	<p>An enhancement request for your campus review and approval has been submitted by [User Created By] for business area [Business Area]. Please consult with your campus reviewers and update the SharePoint item with your applicable review, approval, or disapproval status.</p> <p>Request [ID]: [Request Title]</p> <p>Description: [Request Description]</p>	<p>To: Campus - Business Owner, Functional Analyst, Developer, Lead, AVP/Designee, Presenter</p> <p>Cc: Request Creator (Created By)</p>	Requesting campus users need to review the request and provide AVP/Designee approval or disapproval.	Notification: Requesting Campus
Approved: Enhancement Request [ID] [Title]	<p>The request for [ID]: [Title] has been updated to 'Approved' by AVP/Designee [AVP/Designee].</p> <p>Description: [Request Description]</p>	<p>To: Campus - Business Owner, Functional Analyst, Developer, Lead, AVP/Designee, Presenter</p> <p>Cc: Created By</p>	None; notification is FYI only.	Notification: Requesting Campus
Not Approved: Enhancement Request [ID] [Title] was not approved by the AVP/Designee	<p>The request for [ID]: [Title] has been updated to 'Not Approved' by AVP/Designee [AVP/Designee].</p> <p>Description: [Request Description]</p>	<p>To: Campus - Business Owner, Functional Analyst, Developer, Lead, Presenter, Created By</p> <p>Cc: AVP/Designee</p>	None; notification is FYI only.	Notification: Requesting Campus
(EMPS/ES) Notification of Enhancement Request [ID]: [Title]	<p>An enhancement request for business area [Business Area] has been submitted by [User Created By] and approved by [AVP/Designee]. Please ensure the request is forwarded for other UHS campuses review within the next 24 hours; a new task (assigned to [EMPS Analyst]) has been created with a due date/time of [Due Date/Time].</p> <p>Request [ID]: [Request Title]</p> <p>Description: [Request Description]</p>	<p>To: EMPS Analyst</p> <p>Cc: ES Technical Manager</p>	None; notification is FYI only at this time, however note after expiration of 24 hours analyst will need to forward the request for other UHS campuses review.	Notification: EMPS/ES
24Hr Period for Enhancement Request Review Expired for Request [Title]	<p>The due date/time for updating request '[Title]' for review by the other UHS campuses and updating the associated task as complete has lapsed. Please update the request for other UHS campuses review</p>	<p>To: Assigned EMPS Analyst</p>	EMPS analyst needs to forward the request for other campuses review and update the associated task.	Notification: EMPS



Notification	Example Body	Recipients	Actions to be Taken	Tag
	<p>and the associated task as 'Completed' as soon as possible.</p> <p>Request [ID]: [Request Title]</p> <p>Description: [Request Description]</p> <p>Task [Task ID]: [Task Title]</p>			
<p>Other UHS Campuses Review Notification of Enhancement Request [ID]: [Title]</p>	<p>An enhancement request has been submitted by requesting campus [Requesting Campus] for business area [Business Area]. The request has completed initiating campus review and approval. The request has now been forwarded by the EMPS Analyst for your campus review, and approval to opt-in the request. Please consult with your campus reviewers and update the SharePoint item with your applicable review, approval, or disapproval status for your specific campus within the next 3 days.</p> <p>A new task (assigned to [EMPS Analyst]) has been created for the expiration of the other UHS campuses review cycle with a due date/time of [Due Date/Time].</p> <p>Request [ID]: [Request Title]</p> <p>Description: [Request Description]</p>	<p>To: UHCL/UHD/UHM/UHV Business Owners, Functional Analysts, Leads, Developers, AVP/Designees</p> <p>Cc: EMPS Analyst</p>	<p>Other UHS campuses users need to review the request and provide AVP/Designee approval or disapproval within the next 3 days.</p>	<p>Notification: Other UHS Campuses</p>
<p>3-Day Period for Other UHS Campuses Review has Expired for Request '[Title]'</p>	<p>The 3-day other UHS campuses review cycle has ended. Your EMPS Analyst Review Status needs to be updated to 'Completed' for request '[Title]' and the associated task also needs to be updated as 'Completed'. Please update your review status for the request and the associated task to 'Completed' as soon as possible so that Change Management can schedule a business case review meeting.</p> <p>Request [Request ID]: [Request Title]</p> <p>Description: [Request Description]</p>	<p>To: Assigned EMPS Analyst</p>	<p>EMPS analyst needs to update the review status and associated task as Completed.</p>	<p>Notification: EMPS</p>



Notification	Example Body	Recipients	Actions to be Taken	Tag
	<p>Task [Task ID]: [Task Title]</p>			
<p>Change Management Appointment Needed for Request [ID]: [Title]</p>	<p>Request: [ID]: [Title] has been updated to a campus(es) review status of 'Completed' by EMPS Analyst [EMPS Analyst] .</p> <p>Please update the request with the specific date/time this request will be scheduled for change management review. A SharePoint calendar entry will be automatically created followed by an email notification to users for the scheduled meeting once the request is updated. A new task (assigned to [EMPS Director] has also been created with a due date/time of [Due Date/Time]; mark the task as complete when the request meeting date/time is updated.</p> <p>Request [ID]: [Request Title]</p> <p>Description: [Request Description]</p>	<p>To: EMPS Director, EMPS Program Manager</p> <p>Cc: EMPS Analyst</p>	<p>Someone in change management needs to update the request with a meeting date/time and complete the associated task.</p>	<p>Notification: CM</p>
<p>Meeting Notification for Enhancement Request [ID]: [Title] (For Documentation Purposes Only)</p>	<p>A cursory review meeting has been scheduled by change management for enhancement request [ID]: [Title].</p> <p>Description: [Request Description]</p> <p>Approval Status(es) UHCL Approval Status UHD Approval Status UHM Approval Status UHV Approval Status * Impacted Campus(es): [Campus]</p> <p>Meeting (For Documentation Purposes Only) Start: [Start Mtg Date/Time] End: [End Mtg Date/Time] Location: [Room] Phone/Bridge: [Number] Topic: [ID]: [Title]</p> <p>Identified Attendees:</p>	<p>To: EMPS Director, EMPS Analyst, ES Technical Manager</p>	<p>Note the scheduled meeting date; optionally update your Outlook calendar.</p>	<p>Notification: Meeting</p>



Notification	Example Body	Recipients	Actions to be Taken	Tag
	EMPS Director: [Name] Technical Manager(s): [Name] EMPS Analyst(s): [Name]			
Meeting Notification for Enhancement Request [ID]: [Title] (For Formal Review)	<p>A formal review meeting has been scheduled by change management for enhancement request [ID]: [Title].</p> <p>Description: [Request Description]</p> <p>Approval Status(es) UHCL Approval Status UHD Approval Status UHM Approval Status UHV Approval Status <i>* Impacted Campus(es): [Campus]</i></p> <p>Meeting (For Documentation Purposes Only) Start: [Start Mtg Date/Time] End: [End Mtg Date/Time] Location: [Room] Phone/Bridge: [Number] Topic: [ID]: [Title]</p> <p>Identified Attendees: Presenter: [Name] EMPS Director(s): [Name] ES Director(s): [Name] Campus Analyst(s): [Name] Developer(s): [Name] Campus Lead(s): [Name] Technical Manager(s): [Name] EMPS Analyst(s): [Name]</p>	<p>To: Presenter, EMPS Directors, ES Director, Campus Functional Analysts, Developers, Campus Leads, Technical Managers, EMPS ANALYST</p> <p>CC: AVP/Designees (UHCL/UHD/UHM/UHV)</p>	Note the scheduled meeting date; optionally update your Outlook calendar.	Notification: Meeting
ERBC 24Hr Meeting Reminder [ID]: [Title]	REMINDER: Change management review for enhancement request business case 'ID': [Title]' is scheduled for [Start Mtg Date/Time].	To: Meeting Attendees	Note the scheduled meeting date; optionally update your Outlook calendar.	Meeting Reminder
Provide Recommendation for Request [ID]: [Title]	<p>Please update request [ID]: [Title] with a recommendation. . A new task (assigned to [EMPS Director] has also been created with a due date/time of [Due Date/Time]; mark the task as complete when the request recommendation is updated.</p> <p>Request [ID]: [Request Title]</p>	<p>To: EMPS Director</p> <p>Cc: EMPS Analyst</p>	Change management needs to update the recommendation for the request and mark its associated task as complete.	Notification: CM



Notification	Example Body	Recipients	Actions to be Taken	Tag
	Description: [Request Description]			
Recommendation Notification for Enhancement Request [ID]: [Title]	<p>The recommendation for request [ID]: [Title] has been completed.</p> <p>Request [ID]: [Request Title]</p> <p>Description: [Request Description]</p> <p>Recommendation: [Request Recommendation]</p>	<p>To: Presenter, EMPS Directors, ES Director, Campus Functional Analysts, Developers, Campus Leads, Technical Managers, EMPS ANALYST</p> <p>CC: AVP/Designees (UHCL/UHD/UHM/UHV)</p>	None; notification is FYI only.	Notification: Recommendation
Additional Notifications:				
3-Day Period for Other UHS Campuses Review has been Prematurely Ended for Request [Title]	<p>Other UHS Campuses Review has ended: the EMPS Analyst Review Status has been updated to status 'Completed' on [date/time updated], prior to expiration of allotted 3-Day Other UHS Campuses Review ending [scheduled date/time].</p> <p>Request [ID]: [Request Title]</p> <p>Description: [Request Description]</p> <p>Approval Status(es) UHCL Approval Status UHD Approval Status UHM Approval Status UHV Approval Status * <i>Impacted Campus(es): [Campus]</i></p>	<p>To: Assigned EMPS Analyst</p> <p>Cc: EMPS Director</p>	EMPS Analyst should confirm the premature end of the 3-day other UHS campuses review was appropriate.	Notification: EMPS
36Hr Period for Forwarding Enhancement Request to Other UHS Campuses has Expired!	<p>Thirty-six hours has expired since request '[Request Title]', assigned to [Primary Analyst], has been approved by the initiating campus. The request needs to be forwarded to the other UHS campuses for review, and the associated task updated to 'Completed'.</p> <p>The associated task has been reassigned to secondary analyst [Secondary Analyst]. Please update the request for other UHS campuses review and update the associated task to Complete as soon as possible.</p>	<p>To: Secondary EMPS Analyst</p> <p>Cc: Initial Assigned EMPS Analyst, EMPS Director</p>	Secondary EMPS analyst needs to forward the request for other campuses review ASAP.	Escalation



Notification	Example Body	Recipients	Actions to be Taken	Tag
	<p>Request [Request ID]: [Request Title]</p> <p>Description: [Request Description]</p> <p>Task [Task ID]: [Task Title]</p>			
Post 3-Day Period for Updating Request to 'Completed' for Change Management Review has Expired!	<p>Four days has expired since the other UHS campuses review period was initiated for request '[Title]' The EMPS Analyst Review Status for the request needs to be updated to 'Completed', and the associated task needs to be updated to 'Completed' as soon as possible so that Change Management can schedule a business case review meeting.</p> <p>Request [Request ID]: [Request Title]</p> <p>Description: [Request Description]</p> <p>Task [Task ID]: [Task Title]</p>	<p>To: Primary EMPS Analyst, Secondary EMPS Analyst</p> <p>Cc: EMPS Director</p>	EMPS analyst needs to update the review status and associated task as Completed ASAP.	Escalation
24Hr Period for Updating the Change Management Meeting Appointment has Expired for Request '[Request Title]'	<p>The due date/time for updating request '[Title]' with a change management meeting appointment date and updating the associated task has lapsed. Please update the request with the meeting appointment and update the associated task as 'Complete' as soon as possible.</p> <p>Request [Request ID]: [Request Title]</p> <p>Description: [Request Description]</p> <p>Task [Task ID]: [Task Title]</p>	<p>To: EMPS Director, EMPS Program Manager</p> <p>Cc: EMPS Analyst</p>	Someone in change management needs to update the request with a meeting date/time and complete the associated task.	Escalation
36Hr Period for Updating Request with Change Management Meeting Appointment has Expired!	<p>Thirty-six hours has expired since the EMPS Analyst queued request '[Title]' for Change Management review. The Change Management meeting date/time needs to be updated, and the associated task needs to be updated to 'Completed' as soon as possible so that the users can be notified of the</p>	<p>To: EMPS Director</p> <p>Cc: EMPS Analyst</p>	Someone in change management needs to update the request with a meeting date/time and complete the associated task ASAP.	Escalation



Notification	Example Body	Recipients	Actions to be Taken	Tag
	business case review meeting. Request [Request ID]: [Request Title] Description: [Request Description] Task [Task ID]: [Task Title]			
24Hr Period for Updating the Recommendation for Enhancement Request ' <i>Request Title</i> ' Has Expired	The due date/time for updating request ' <i>Request Title</i> ' with a recommendation has lapsed. Please update the request with a recommendation and update the associated task as 'Complete' as soon as possible. Request [Request ID]: [Request Title] Description: [Request Description] Task [Task ID]: [Task Title]	To: EMPS Director Cc: EMPS Analyst	Someone in change management needs to update the request with the recommendation and complete the associated task.	Escalation
36Hr Period for Updating the Recommendation for Enhancement Request ' <i>Request Title</i> ' Has Expired	The due date/time for updating request ' <i>Request Title</i> ' with a recommendation has lapsed. Please update the request with a recommendation and update the associated task as 'Complete' as soon as possible. Request [Request ID]: [Request Title] Description: [Request Description] Task [Task ID]: [Task Title]	To: EMPS Director Cc: EMPS Analyst	Someone in change management needs to update the request with the recommendation and complete the associated task ASAP.	Escalation
Workflow Item NOT COMPLETED, Reminder 3+	The appropriate status update and/or update of the associated task is not yet complete. Please make all appropriate updates (status as well as task) as soon as possible. Request [Request ID]: [Request Title]	To: Primary EMPS Analyst, Secondary EMPS Analyst Cc: EMPS Director	After the lapse of a targeted due date, this reminder regenerates every 24 hours via an incrementing counter. The EMPS analyst needs to complete the associated request status and task status updates.	Escalation



Notification	Example Body	Recipients	Actions to be Taken	Tag
	Description: [Request Description] Task [Task ID]: [Task Title]			
Meeting Change: ERBC Scheduled Meeting Date/Time Has Changed	An update to the scheduled meeting start time was made on enhancement request '[Request ID]: [Request Title]' to occur on [updated meeting date/time] instead of [previous meeting date/time]. Previously Identified Attendees: [Attendees]	To: Meeting Attendees Cc: EMPS Program Manager, EMPS Director, EMPS Analyst	None; notification is FYI only...	Notification: Meeting Change

B. Other Documentation

Also available is a companion PowerPoint presentation, titled “Automated ERBC Overview”. The presentation provides a high-level overview of the Automated ERBC Toolset and is available in the same location as this user guide on the ERBC WorkCenter page of the EMPS SharePoint site.

C. Outlook Integration – Viewing ERBC Scheduled Meetings in Outlook

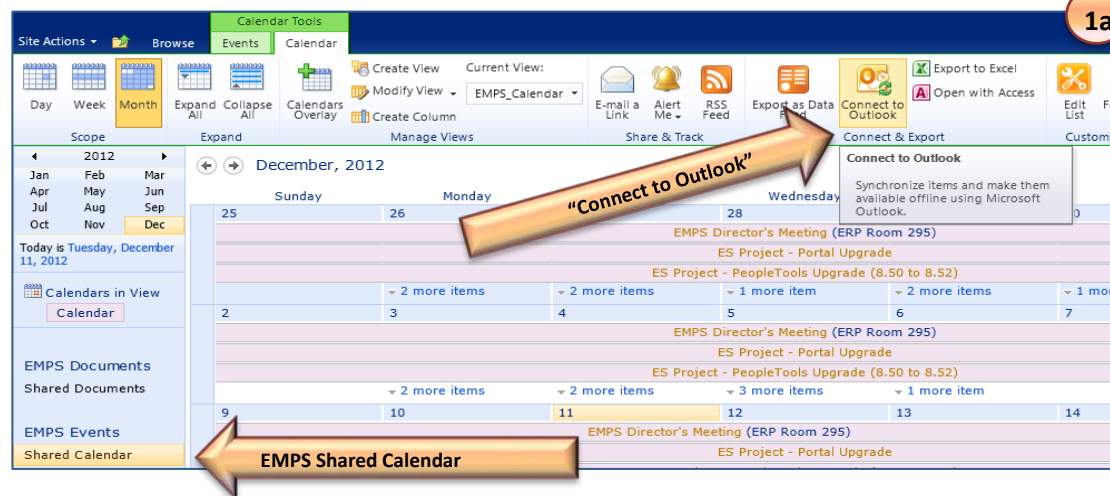
Microsoft Outlook 2010 can be used to view a calendar from a SharePoint site side-by-side with an Outlook calendar, as well as view an overlay of the calendars as if they were one single calendar. Users can keep track of scheduled ERBC meetings from within their Outlook application.

1

Access a SharePoint calendar in Outlook

When you connect a SharePoint calendar to Outlook, it appears under “Other Calendars” with your calendar folders.

- Open the calendar on the SharePoint site.
- On the Calendar tab, in the ‘Connect and Export’ ribbon group, click “**Connect to Outlook**”.
- When prompted to confirm that you want to allow the website to open a program on your computer, click Allow. When prompted to confirm that you want to connect the SharePoint calendar to



1a



Outlook, click Yes. In Outlook, in Calendar, the SharePoint calendar is added to the Navigation Pane under **Other Calendars**.

1b Internet Explorer

Do you want to allow this website to open a program on your computer?

From: **share.uh.edu**

Program: Microsoft Outlook

Address: stssync://sts/?ver=1.1&type=calendar&cmd=add

Always ask before opening this type of address

Allow Cancel

Allowing web content to open a program can be useful, but it can potentially harm your computer. Do not allow it unless you trust the source of the content. [What's the risk?](#)

1c Microsoft Outlook

Connect this SharePoint Calendar to Outlook?

You should only connect lists from sources you know and trust.

EMPS - Calendar

<https://share.uh.edu/emps/Lists/Calendar/>

To configure this Calendar, click Advanced.

Advanced... Yes No

1d Outlook "Other Calendars"

SharePoint "EMPS-Calendar" in Outlook



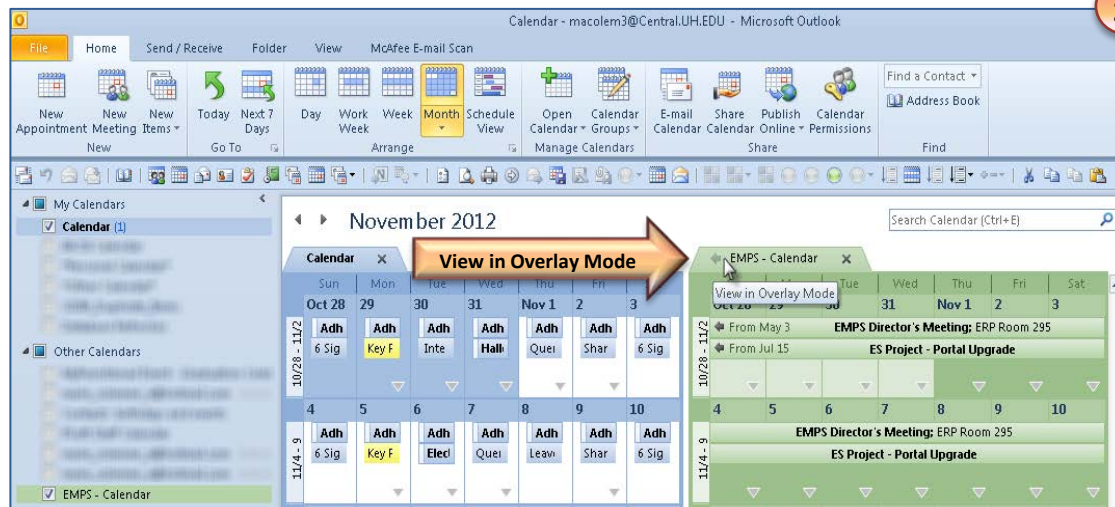
2 Overlay a SharePoint calendar with another calendar

You can overlay a SharePoint calendar with Outlook calendars or with other SharePoint calendars so that you can see all events at one time.

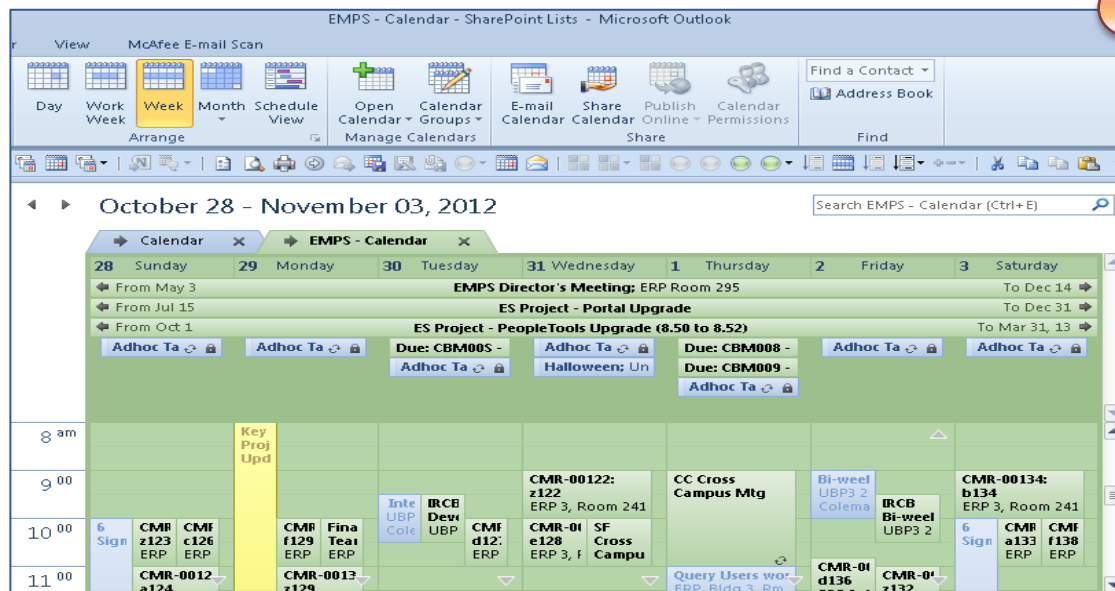
In Outlook by default, the SharePoint calendar opens in Calendar view under Other Calendars in the Navigation Pane. It is displayed as an additional calendar next to your default calendar in Side-By-Side Calendar view.

To view the EMPS SharePoint calendar as an overlay with other Outlook calendars within Outlook:

- In Calendar, in the Navigation Pane, select or clear the check box of another calendar until the calendars that you want to overlay are displayed. Each calendar that you select opens to the right of the last calendar opened.
- On the Calendar tab, click the arrow. The arrow changes color when you point to it or click it. When you click the arrow, the tab moves to the left. The calendars are now in overlay mode.
- To add another calendar to the overlay, repeat the previous steps.
- To remove an overlaid calendar, click the arrow on the Calendar tab, or clear the calendar's check box in the Navigation Pane.



2a



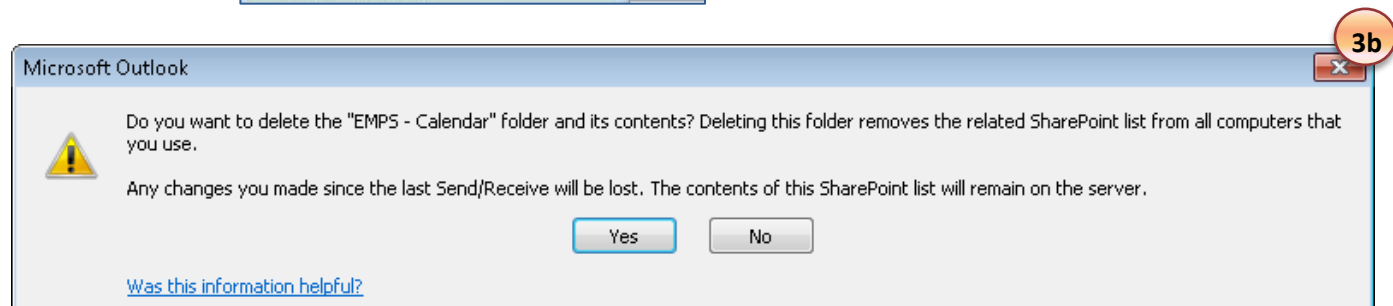
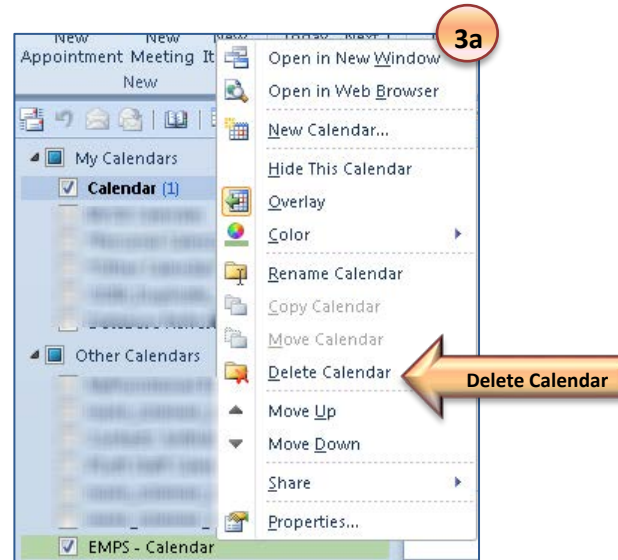
2b



3 Remove a SharePoint calendar from Outlook

- o In Calendar, in the Navigation Pane, under Other Calendars, select the calendar that you want to remove.
- o Right-click the calendar, then click Delete calendar folder name.
- o When you are prompted to confirm the deletion, click Yes.

Note: This procedure removes the calendar only from Outlook, not from the SharePoint site.





D. Printing (if necessary)

One of the aims of the Automated ERBC toolset is to effectuate the initiative to “Go Green” and reduce costs associated with paper printing. Therefore it is encouraged to not print the requests unless necessary. If printing of the request form is necessary, the below instructions can be used for obtaining a printed object; note, current printing capabilities are limited.

1 Printing Data Form

- Right click on the list item and open it in a new window (instead of modal).
- Navigate to Print Preview.
- For view “InfoPath Form Request”, change the print size to a percentage that is below 60% (50% – 52% appear to produce consistent print results) . For the other views, the default print size does not need to be changed.
- Print the document by clicking on the Print icon.

The screenshot illustrates the process of printing an enhancement request form. It is divided into three main sections:

- 1a:** A table titled "Enhancement Requests" with columns for Request Number, Title, Status, and Requester. A right-click context menu is open over the row with Request Number "CHR-00162" and Title "Create New CB122 Report". The option "Open in new window" is highlighted. An arrow labeled "Open in New Window" points to this option.
- 1b:** A browser window showing the "UHS Enhancement Request Business Case" form. A context menu is open over the "Print" icon in the top right corner, with "Print preview..." selected. An arrow labeled "Print Preview" points to this option.
- 1c:** A "Print Preview" window showing the rendered form. The form includes the UHS logo and the title "UHS Enhancement Request Business Case". It contains various fields for request details and a table for "Proposed Enhancement Request" with columns for Item, Requester, Request Title, Request Status, and Requester.



ERBC USER GUIDE VERSIONING