Financials Update

05/16/12
Access Role Change

PR Department Manager role change – July 1, 2012:

• Automated assignment process
  – Based on Department Manager as recorded for a Dept ID in M-Pathways

• How it will work:
  – Process looks for **current** Dept Mgr
  – Automatically adds/removes role & system access as applicable.

Navigation path to look up a Dept Mgr in M-Pathways:
Set up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > ChartField Values
OARS Changes – July 1, 2012:

- PR Department Manager User role removed
- Two ways to designate an Alternate approver
  - Dept Mgr can add/delete Alternates in M-Pathways
  - Fin UL can submit OARS request as a change to the Dept Mgr
- When Alternate info updated, the process adds/removes role & access for the Alternate

Navigation path in M-Pathways:
Set up Financials/Supply Chain > Approval Profile > Approval Profile
What to do when... common scenarios

• Planned time away
  – Dept Mgr assigns a temporary alternate in M-Pathways

• Change the approver for a routed req/voucher
  – Contact Accounts Payable to request a “worklist transfer”
  – Include name & uniqname of the current & new approver
  – (734) 764-8212 or procurement.services@umich.edu

• Department Manger changes (beginning July 1, 2012)
  – Submit a completed Department form to Financial Operations
Upcoming Action Item: UL feedback required

• **Issue**: Since the 2010 Concur implementation, Service Desk call volume for Concur remains high

• **Plan**: Survey ULs to obtain unit feedback on:
  – Best way to reach Concur users in your unit
  – Identify performance support/training options
  – Suggestions to encourage use of existing self-service resources

Look for more information in your email soon!