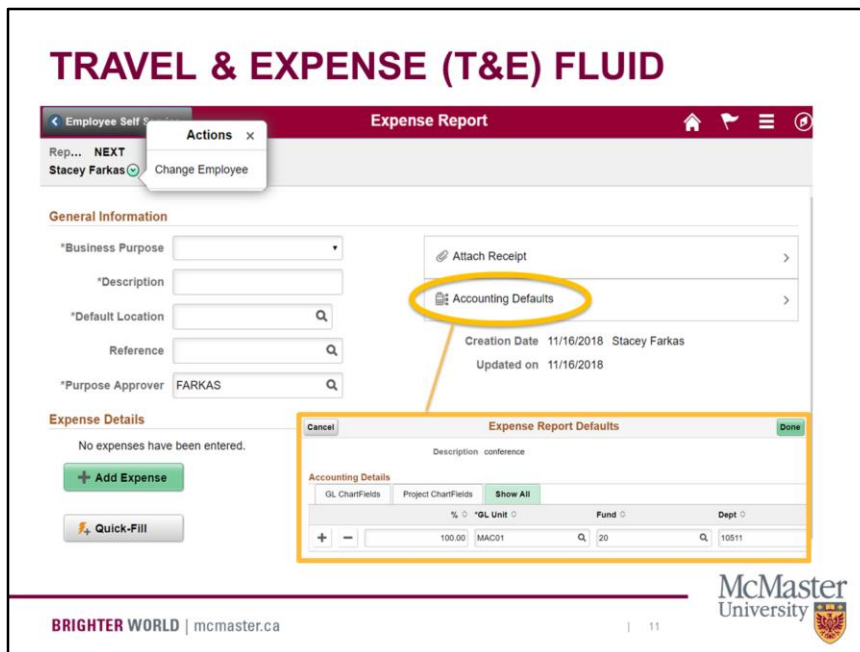


Some Usability 'Requests'

- "Make the system and service easier for end users"
- "Help menus and guidance documents in MOSAIC directly in the module where the user is working"
- "Remedy lack of main documents/tile listing all queries and reports for specific areas"
- "Reporting Inventory needed"

- With an up to date and fairly stable system we've been able to focus more on delivering some new and improved features within Mosaic.
- Based on feedback received from several survey's (uniform customer satisfaction, reporting focus group, research finance and IT review), we've mapped out a plan of new functionality focused on making the system more user friendly.
- Going to highlight a few changes that are coming within the next few weeks



T&E FLUID – an ‘upgrade’ to a whole module – moving from ‘classic’ version to the ‘fluid version’

What is Fluid? - UPDATED, MORE USER FRIENDLY INTERFACE –SCALABLE FOR USE ON TABLETS, PHONES, ETC. – direction Oracle is going in for pages – WE ALREADY USE FLUID NAVIGATION

The same fields are required and available to complete, either fillable or drop down menus.

ADVANTAGE: Chart field string can be entered in Header to default as each line is added.

Purpose Approver – defaults to claimant and must be changed (vs. being blank)

For users with delegate entry rights – click CHANGE EMPLOYEE instead of adding at beginning during ‘add a new value’

T&E FLUID cont.

The screenshot shows the 'Expense Entry' form with the following details:

- Header:** Expense Report, Expense Entry, Save, Review and Submit, Last Sav. 11/16/2018 3:16PM
- Summary:** Total (1 Item) 150.00 CAD
- Transaction:** Conference Registration - 11/16/2018
- Fields:**
 - Date: 11/16/2018
 - Expense Type: Conference Registration
 - Purpose Approver: MITTON
 - Description: CHEUG Conference 2018
 - Payment: Personal (Cash, Credit, Cheque)
 - Amount: 150.00 CAD
 - VAT Applicability: Taxable
 - Calculated VAT: 17.26
 - Override VAT: []
 - Billing Type: Internal
 - Expense Location: HAMILTON, Ontario
 - Attach Receipt: []
 - Accounting: []
 - Receipt Split: []
- Callouts:**
 - 'Remembers most commonly used' points to the Expense Type field.
 - 'VAT selection on line, not separate screen' points to the VAT Applicability and Calculated VAT fields.
 - 'Accounting default from header – just override if necessary' points to the Accounting field.
- Footer:** BRIGHTER WORLD | mcmaster.ca | 12, McMaster University logo

Expense type – system will keep track of and display your most commonly used types instead of showing a list of every item that you need to scroll through each time (efficiency)

VAT treatment/amounts – appear within the line item vs. appearing on a different tab (as is the case now with the current classic version)

TIMING for rollout – beginning of December – classic will go away. Open houses will be held the entire week of the 10th.

Navigation Collections

- **New Home Page** – to eventually replace 'MY WORK'
 - **ADMINISTRATIVE HOME** – collection of Navigation Collections
 - FINANCE TASKS
 - FINANCIAL REPORTING HUB
 - FINANCE WORKLIST
 - HR TASKS
 - HR REPORTING HUB
 - HR WORKLIST
 - CAMPUS FACULTY CENTRE
 - CAMPUS CENTRE
- Provides access to commonly used items quickly and with fewer 'clicks'
- Only see what your security roles give you access to
- Currently obtaining feedback and testing
- **Timing:** beginning of December at same time as T&E Fluid
- *Nav collection for My Research Tile – in initial stages of gathering requirements*



Navigation Collections – grouping of work items together in one screen - brings all regularly executed tasks to one place

- MENU ON THE LEFT - BRINGS TASK SCREEN TO THE RIGHT

- Provides access to commonly used items quickly and with fewer clicks than navigation menu.
- Users can navigate using the related links in the collection without losing the context of the business process in action (don't leave your current page)

We've created two for each stream (HR already existed and campus already existed) – just renaming to– TASKS AND REPORTING

HR TASKS and Reporting – exists now...under HR Work Home Page (called HR Department Administrator and Dept Admin HR Reporting Hub) – will exist in both places for a bit with new names as above

Timing – beginning of Dec at same time as T&E fluid – then more will be developed ongoing



Most commonly used tasks listed on the left – task screen appears on the right

Menu items grouped by module with RELATED CONTENT built into the menu (items with a '?' in front)

These are not final – still obtaining feedback



- Replaces what we've tried to do with the GL Workcentre for grouping useful and commonly used reports and queries

Related Content

- Either built into Navigation collections....

.... OR exists on source page

- **Timing:** some at same time as nav. collections, then more ongoing

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The linking of contextually relevant content within application pages, which creates opportunities for the user to view or quickly access information that supports, extends, and augments the business process

- guides
- policies
- Training videos
- Opens up in a new window within the same browser
- DON'T HAVE TO GO SEARCHING FOR DOCUMENT IN Support and Documentation!
- At your fingertips and will always link to THE MOST CURRENT VERSION of a document

FLUID WORKCENTERS - MACBILL

- Already implemented for BILLING and ACCOUNTS RECEIVABLE with MacBill launch in May
- All tasks/reports/queries you need to complete your job related to Billing and AR are in one location

The screenshot displays the 'Billing WorkCenter' interface. On the left is a sidebar menu with categories like 'Current Work', 'Recent Invoices', 'Exceptions', 'Links', 'Customer/Sponsor', 'Billing', 'Billing Interface', 'Queries', 'Reports/Processes', and 'Reports'. The main area is titled 'Recent Credit and Rebill Invoices' and contains a table with columns: Business Unit, Invoice, Bill To, Customer Name, Invoice Amount, Currency, Bill Status, and Next Invoice. A row is visible with values: ARENG, ENG-00030, 10000522, [redacted], -19,756.71, CAD, INV. Below the table are two tiles: 'Receivables WorkCenter' with a person icon and 'Billing WorkCenter' with a document icon. The McMaster University logo is in the bottom right corner.

WorkCenters are configured to allow access to all the pages needed to perform a job without needing to navigate to multiple components using menus, therefore streamlining work and saving time

FLUID version of worcenters have better layout and more intuitive interface – using for MacBill users now

Really FOR POWER USERS who look at them for managing day-to-day tasks (personal view of my work world)

Giving us practice for how to configure and use – may role out for other purposes – see how nav collections go...

Continuous Improvement - What's next?

- More related content
- Improved training materials/videos
- Activity guides
- Fluid approvals
- Ability to search
- Page and field configurator
- Etc..



❖ **One page summary handout available at registration desk for features highlighted today**

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This is not a 'one time effort' – will continue to research new features and update system to improve user experience and add efficiencies

Already 'in the queue':

- more related content – will just be added as available
- improving training materials – some addition of quick videos
- **ACTIVITY GUIDES:**
 - allow you to define guided procedures for a user or group of users to complete list of actions/tasks in order (step by step process)
 - potential to eliminate some training guides
 - **Issues addressed:** Having to navigate to several different pages to complete a task. Can be across modules and pages, especially useful for infrequent users not remembering process
- **FLUID APPROVALS**
 - improved worklist combining Finance and HR transactions
 - transactions can be organized/filtered by type, date, requestor
- **ELASTIC SEARCH**
 - Ability to search within specific components (pages) or overall..
- **PAGE AND FIELD CONFIGURATOR** - gives us the flexibility to configure fields and pages in any component without having to customize delivered application pages or fields