



Client Services Overview

AOC Conference – December 8, 2009

Who is Client Services?

- **Client Services is:**
 - A Branch in the Financial Systems Division of the Finance Office, Office of the Chief Financial Officer
 - Comprised of two teams
 - Help Desk
 - Training Team
- **Mix of Federal employees and contractors**
 - All civilians – no officers

Client Services – Organization

Office of the Chief Financial Officer

Maureen Wylie – CFO



Finance Office

Jon Alexander - Comptroller



Financial Systems Division (FSD)

Mat Grow – Division Chief



Client Services Branch (CSB)

Rosemary St. Clair – Acting Branch Chief

Client Services – Organization

Client Services Branch (CSB)

Rosemary St. Clair – Acting Chief



Help Desk

Rosemary St. Clair – Supervisor

Carolyn Ayodeji

Faranak Fouladi

Nancy Haltiwanger

Ritu Marwah

Nicole McCoy

Deborah Sampson

Eric Smith

Liz Wilson

Training Team

Erin Cobbs

Jonathan Wolf



Client Services Help Desk

Supported Applications

- **All Commerce Business System (CBS) Applications**
 - **Core Financial System**
 - **Accounts Payable**
 - **Accounts Receivable**
 - **Budget Operating Plans (BOPs)**
 - **Budget Execution**
 - **General Ledger**
 - **Reimbursable Agreements**
 - **Summary Level Transfers (SLTs)**
 - **Detail Labor Adjustments (DLAs)**

Supported Applications

- **CBS (continued)**
 - Commerce Purchase Card System (CPCS)
 - Data Warehouse
 - Oracle Discoverer
 - Integrated Travel Manager (ITM)

- **CSTARS**
 - C.Request
 - C.Buy

What happens when I call the Client Services Help Desk?

- Call is routed to appropriate staff based on automated selections made by caller
 - Automated options are changing effective December 14, 2009. An email will be sent to all customers providing details.
- Help Desk Representative answers call/email
 - Answers question/resolves issue
 - Logs issue in HEAT a tracking software
 - If necessary, routes issue to appropriate 2nd tier support team
 - 2ND Tier support provided by subject matter experts in the various groups throughout the Finance Office headquarters in Germantown, MD & Acquisitions.

NOAA Client Services Help Desk Support

- Functional/Technical Support for CBS Applications
 - Budget Operating Plans (BOP)
 - Reimbursable Agreements
 - SLTs & DLAs
 - Data Warehouse/Discoverer
 - Commerce Purchase Card System (CPCS)
 - Travel
 - C.Request/C.Buy
- User Account requests, Citrix/JInitiator, etc.
- FSD/CBS Web Site www.corporateservices.noaa.gov/~cbs
 - Click on Help Desk link for additional info, phone numbers, etc.
 - Email: ClientServices@noaa.gov
 - Phone # (Until 12/11/09 – 301-427-1023)
 - Phone # (Starting 12/14/09 – 301-444-3400)





Client Services Training Team

Training Classes

- The Client Services Training Team currently offers the following classes
 - BOP New User (2 days)
 - Reimbursable Agreements New User (2 days)
 - BOP/Reimbursable Overview (1 day)
 - SLT/DLA New User (1/2 day) - **Currently being updated**
 - C.Request New User (1 day)
 - CPCS New User
 - Cardholder (1/2 day)
 - Approving Official (1/2 day)
 - Data Warehouse (1/2 day)
 - Discoverer New User (1/2 day)

Training Classes (continued)

- **Travel Manager (ITM) Training**
 - **New User Training (3 days)**
 - Intended for new Preparers/Group Administrators
 - Intensive, hands-on, covers most situations a preparer could encounter
 - Recently updated to include new exercises reflecting issues and scenarios discovered over past year
 - **Signing Vouchers Electronically (1 hour webinar)**
 - Intended for travelers who do not create documents
 - How to log in, view, and electronically sign vouchers

Training Classes (continued)

- **Travel Manager (continued)**
 - **Reviewing/Approving (2 hour webinar)**
 - **Intended for reviewing and approving officials**
 - **How to review, approve, reject documents electronically**
 - **Routing Administration (2 hour webinar)**
 - **Intended for Routing Administrators**
 - **How to create and maintain electronic routing lists**

The Client Services Training Team also provides one-on-one assistance for Routing Administrators upon request.

- **Routing Administrators should call the Client Services Help Desk and request a one-on-one session.**
- **Typically done as a webinar looking at user's specific lists**

Training – Coming Soon

- **ITM Refresher Courses**
 - ITM Refresher Basic (Tentatively 2nd Qtr)
 - ITM Refresher Intermediate (Tentatively 2nd Qtr)
 - ITM Refresher Advanced (TBD)
- **C.Buy (TBD)**
- **E-Learning/Computer Based Training**
 - In early planning stages
 - Intended for less intensive classes such as:
 - CPCS Cardholder and Approver
 - ITM Reviewer/Approver
 - ITM Signing Vouchers Electronically
 - Data Warehouse/Discoverer

Training – How to Register

- Registration for Training done through the Commerce Learning Center (CLC) at NOAA
 - <https://doc.learn.com/noaa>
- If person does not have access to the CLC (i.e. contractor) but would like to sign up for a class
 - Email: cbs.trainingservices@noaa.gov
- If your office would like training at your location
 - Email: cbs.trainingservices@noaa.gov
 - Requirements
 - Must have significant number of trainees (Typically 15-20)
 - Must be willing to cover travel costs for two trainers
 - Must not impact regularly scheduled training

Online Resources

- Financial Systems Division Webpage
 - <http://www.corporateservices.noaa.gov/~cbs/index.html>
 - Links to:
 - Help Desk information
 - CBS Contact Information
 - Documentation
 - Forms
 - Accounting (ACCS) Information
 - Training Information
 - ITM Information

Online Resources (continued)

- **Training Information Includes:**
 - **Links to Current Training Schedule**
 - **Enrollment Instructions**
 - **CLC Support Contacts**
 - **ITM 9.0 Training Documents**

System Access

CBS (Including CFS, CPCS, Data Warehouse)

https://cbs.rdc.noaa.gov/nmadm/custom_pages/login_page

ITM 9.0

<https://itm-prod.rdc.noaa.gov/cgi-bin/90ipi/docprep/login.w>

C.Request

https://crequestprod.ocs.doc.gov/noaa_prod/servlet/Comprizon

Discoverer

<https://cbsquery.rdc.noaa.gov/discoverer/plus>

Questions & Discussion

Why...

What
about...

Will
this...

Who...