

SLACK/TRELLO: A COLLABORATIVE DREAM TEAM

MIKE AND TRAVIS

THE PREAMBLE

- Everything is changing
- The way we communicate has costs, and there are strategies that can lower this cost.
- Slack & Trello are part of what we've found is a better strategy.
- Spirit of CUSP



slack

Team communication for the 21st century.

Channels

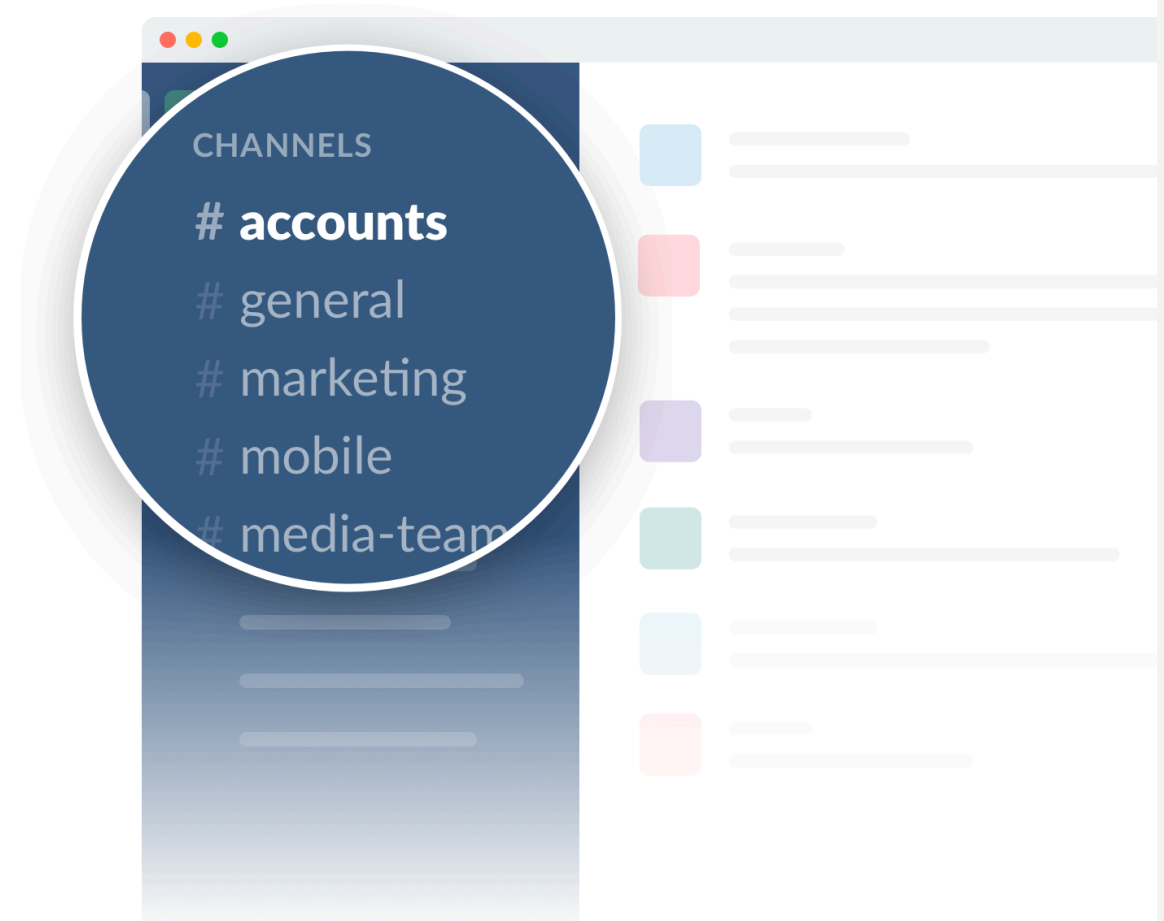
Organize your team conversations in open channels. Make a channel for a project, a topic, a team, or anything—everyone has a transparent view of all that's going on.

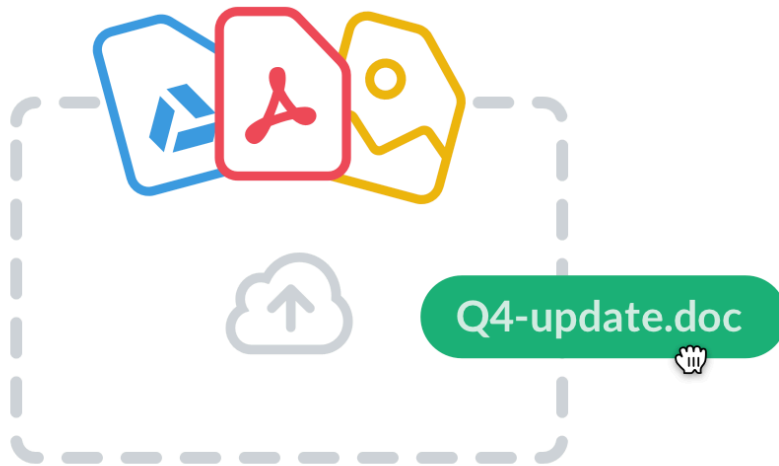
Private Channels

For sensitive information, create private channels and invite a few team members. No one else can see or join your private channels.

Direct Messages

To reach a colleague directly, send them a Direct Message. It's completely private and secure.

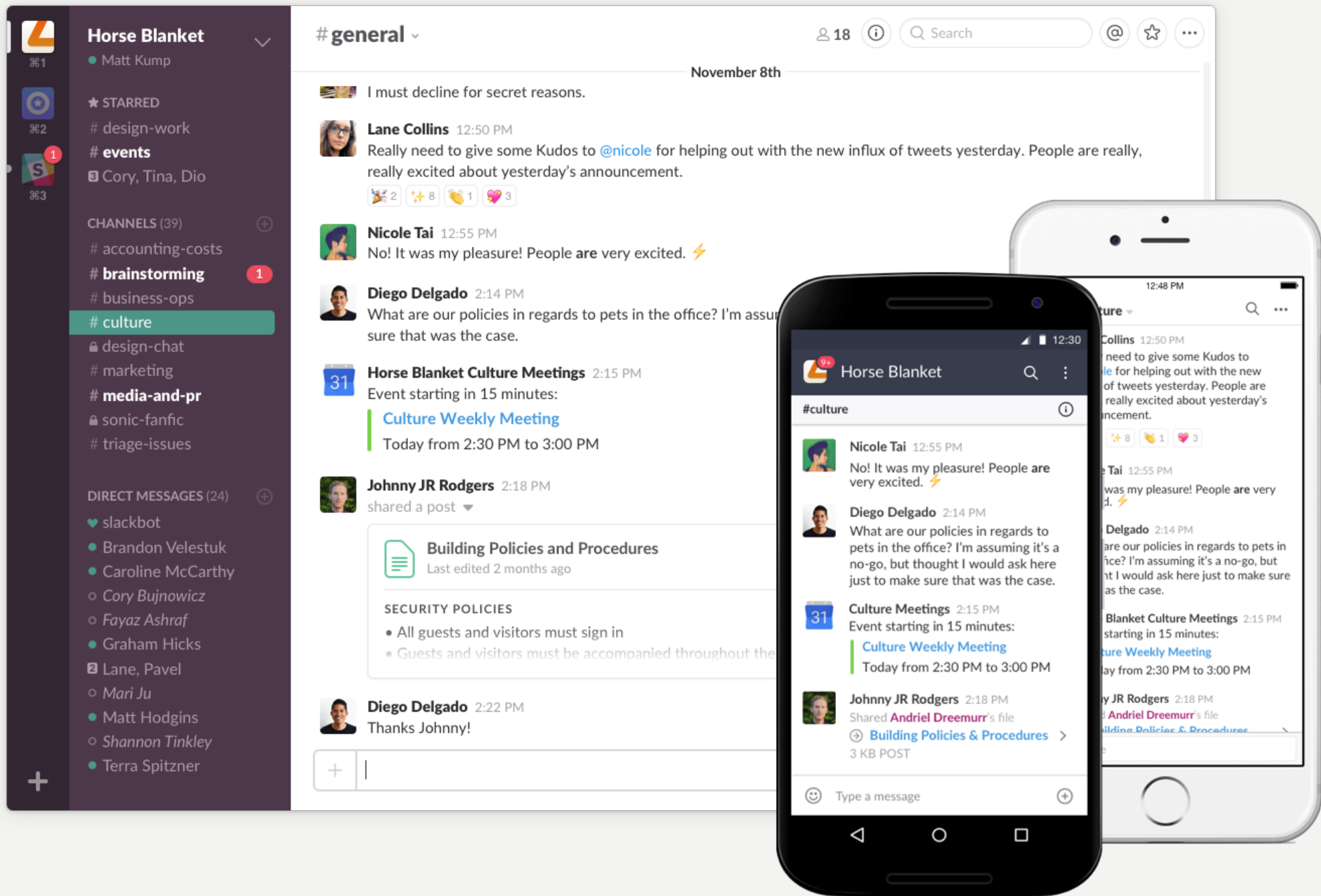




Drag, drop, and share your files.

Not just your messages, but **all your files**, images, PDFs, documents, and spreadsheets can be dropped right into Slack and **shared with anyone you want**. Add comments, star for later reference, and it's all completely searchable.

If you use any services like Google Drive, Dropbox, or Box, just paste the link and that document is **immediately in sync and searchable** too.





adam 10:32 AM

FYI - we've been getting more and more contacts regarding Gasco charging tax on invoices. This is creating an A/P debit balance on the ST. Make sure they get a credit memo from Gasco for the tax (if they haven't already) and then the department needs to do a JE (I'm assuming) to move the A/P debit balance to the proper account code - should be the same where the credit memo was applied

One department did not want to do the JE since it was an A/P issue so I escalated to AP (I know they have done JEs to fix similar tax issues in the past, but we'll see how it goes now)



brianjamesdyet 10:48 AM

I have had at least 6 of these in the last two days and I've been escalating to A/P. I don't think the department should do the JE, but I guess there is nothing to stop them from doing that.



adam 10:48 AM

Barry wrote back saying they had to fix it (on one of the ones I escalated)

but I agree, we've always sent these to AP in the past

and they fixed it



brianjamesdyet 10:52 AM

I have escalated to Mark and haven't heard back on any of them. There are so many that we will need Mark to clarify the process. I would think that an A/P JE should be fixed by A/P as it is not the department's error that is causing the out of balance.



adam 10:55 AM

should we just escalate to Mark /team leads and leave off the Tech?



Inittoli 11:02 AM

I will write to Mark to find out what we should be doing. I am also wondering if I should contact the PA for Gasco to find out why this is happening.

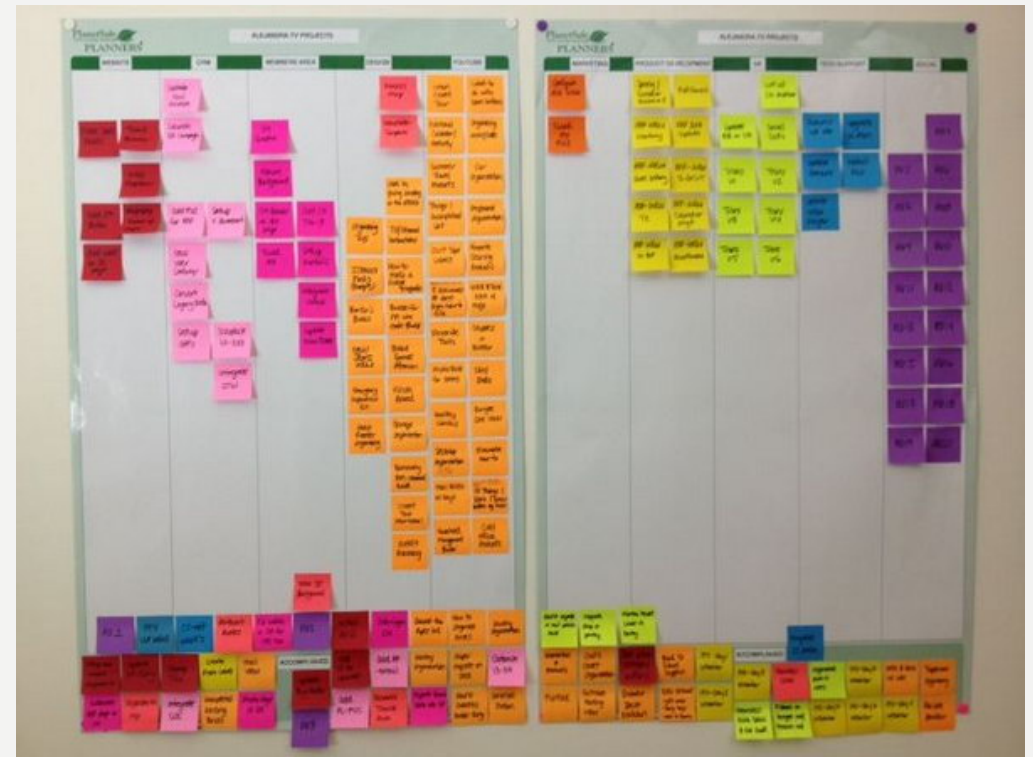
SLACK SUMMARY

- We are using the free version and love it
 - Works everywhere
 - We decide what is relevant to us...*at that time*
 - Our emails got better
 - Backchannel to life as a team
 - Slack is a chat platform people *want* to use
- 20,000+ messages

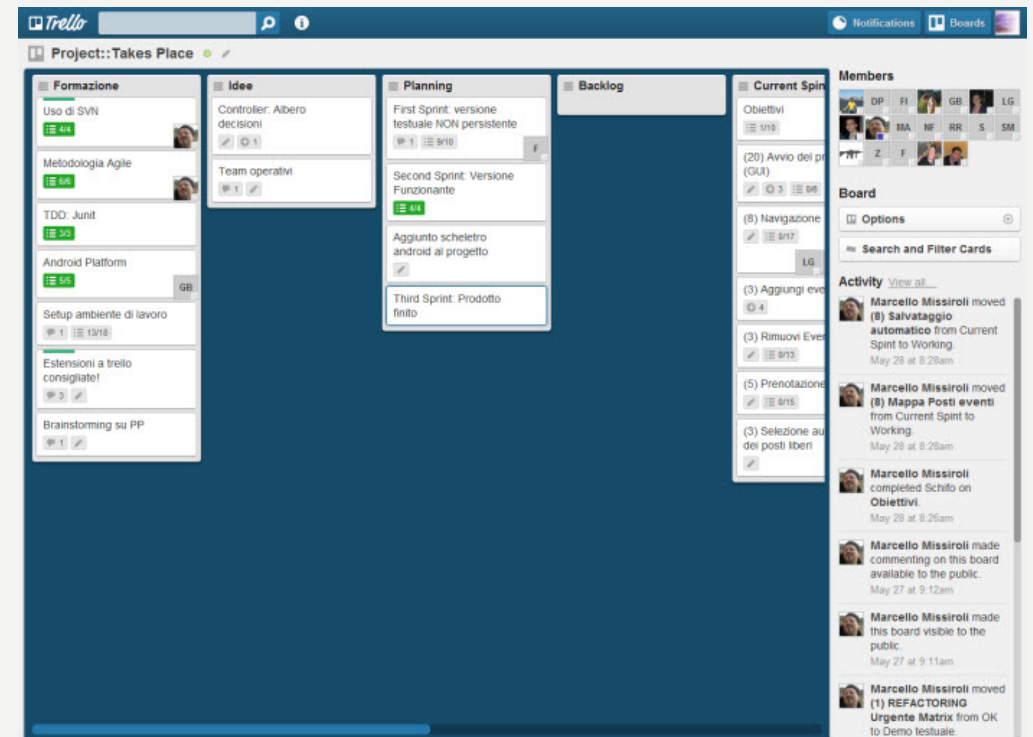
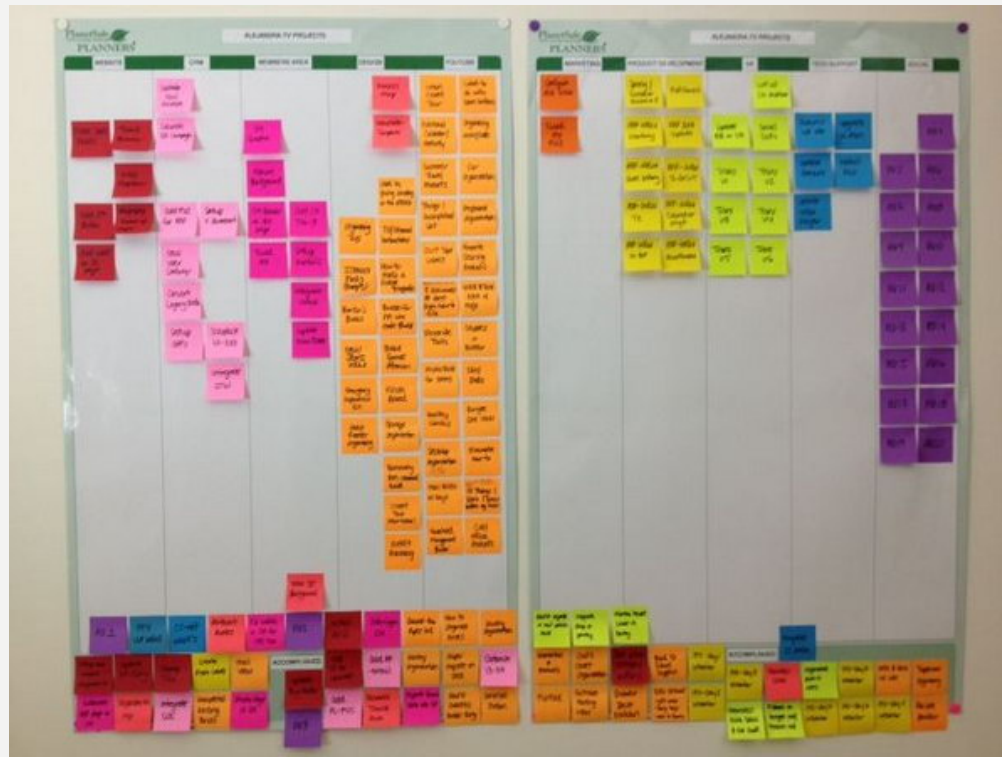


TRELLO

- Piles of post it notes
- Highly configurable
- A great tool to manage tasks
- Or organize other things



TRELLO IS LIKE POST IT NOTES



Unassigned To Do

FIN TRAINING ENVIRONMENT

9

4

FIN online course content from CU Denver new trainings

1

2

4

Add a card...

Normandy To Do

Video on accruals/reversals

3

Apr 12

4

Write script: delete journal

Mar 29

4

Write script: JE process

2

Mar 29

4

Write script: approval workflow process

Mar 29

4

Write script: copies w or w/o reversals

1

Mar 29

4

Write script: Managing Email Notifications in Outlook video

2

Apr 18

4

Content: PET webinar/demo

1

Apr 18

4

Content: LR Page for Reporting Tools

1

Apr 11

2

Content: LR Page for Projects

May 2

Add a card...

Travis To Do

Embed "Looking Up Payments" video on website

1

4

Replace "What Makes A Good Attachment" embed on website

1

3/4

Apr 11

2

Update Elevate slider on OUC home page and link multimedia page to the elevate fin website

Apr 15

2

On this page, https://www.cu.edu/controller/actual-journal-entry-debitcredit-convention, replace the QRG with the attached.

1

Apr 4

1

On this page, https://www.cu.edu/controller/policies/disabling-autocomplete, replace the SbS with the attached.

1

Apr 4

1

On this page, https://www.cu.edu/controller/adding-attachments, replace the SbS with the attached.

1

Apr 4

1

On this page, https://www.cu.edu/controller/policies/personalizing-general-ledger-workcenter, replace the SbS with the attached.

Add a card...

Mike To Do

Open Enrollment HOW-TO Video

4/5

Looking Up Study Subject Payments video

4

3

1

1/5

Apr 20

4

Add a card...

Heather To-Do

Add a card...

Lisa To-Do

University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

FIN: LR Review

12

1

30/37

Mar 31

4

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Boards

New stuff!

Elevate

Private

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in list Travis To Do

Members

Last Updated

yesterday at 8:55 AM

Edit the description...

Add Comment

Write a comment...

Send

Activity

Heather Hoyer joined this card yesterday at 8:55 AM

Normandy Roden joined this card Apr 17 at 12:28 PM

Michael Edwards moved this card from Mike To Do to Travis To Do Apr 13 at 11:17 PM

Michael Edwards added Travis to this card Apr 13 at 11:17 PM

Michael Edwards

Video: https://www.youtube.com/watch?v=CIJAhmNbAx4&feature=youtu.be

FIN 9.2 How-To: Looking Up Payments

FIN 9.2 HOW-TO

LOOKING UP PAYMENTS

Add

Members

Labels

Checklist

Due Date

Attachment

Actions

Move

Copy

Subscribe

Vote

Archive

Share and more...

Travis

Calendar

Show Men

Lisa To-Do

University of Colorado

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12 1 30/37 Mar 31

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Boards

Trello

+ Travis ⓘ 🔔

Elevate ☆ Private

Calendar ... Show Menu

Today ^ v

April 2016

Week Month X

Sun	Mon	Tue	Wed	Thu	Fri	Sat
3	4 12 cards FIN LR Web Update FIN LR Web Update On this page, https://www.ou.edu/centr	5	6	7	8	9
10	11 1 card Replace "What Makes A Good Attachment" embed on website	12	13	14	15 1 card Update Elevate slider on OUC home page and link multimedia page to the elevate fin website	16
17	18	19	20 2 cards Open Enrollment HOW-TO Video Looking Up Study Subject Payments video	21 17 cards Elevate Web Updates - Recently Used Elevate Web Updates - Journal Entry Process Overview	22 1 card Video on accruals/reversals	23
24	25	26 2 cards Questions for Cal **04/30** Redesign of What Are PO Encumbrances? video	27	28 2 cards Write script: JE process Write script: copies w or w/o reversals	29 1 card Write script: delete journal	Apr 30
May 1	2 2 cards Write script: approval workflow process Write script: Managing Email Notifications in Outlook video	3	4	5	6	7
8	9	10	11	12	13	14

TRELLO SUMMARY

- We are using the free version and love it
 - Works everywhere
 - Trello notifies us by email AND IN SLACK when stuff happens (new cards, due dates, etc.)
 - Visual representaion of what we are doing and how busy we are
 - Easier to stay on top of everything we do (~600 cards)
 - Trello is a task management tool people *want* to use



**WHY SHOULD
CU CARE?**

SOAPBOX TIME

- We have changed the way we work in almost every way...except team communications
- Historically there were a litany of reasons (read:excuses) to NOT update our communications model
- Now it is cheap enough, easy enough, familiar enough, big enough
 - Fastest growing startup of all time.
- Users decide how much to embrace