

Business Process Advisory Group – August 12, 2011 – INSCC Room 110

Attending:

Ann Marie Breznay, LIB
Bobbie Harris, COE
Carol Hsieh, FBS
Dean Church, FBS
Gary Gledhill, FBS
Jennifer Long-Pratt, FBS
Laura Howat, FBS
Leslie Bigler, CMES
Margaret Tennant, USTAR
Marilyn Cox, CSBS
Pam Mollner, IA
Rebecca Baggett, FBS
Sandy Hughes, BUD
Steve Allen, FBS

Bob Turner, FBS
Carl Larson, FBS
Dave Bardsley, PHARM
Frederic Hon, HU
Jane Scott, FBS
Jessica Stokes, UIT
Leatha Allred, COS
Liz Nagata, PHIL
Marilyn Burton, SOM
Marv Hawkins, ACS
Perry Hull, FBS
Sandy Bruhn, ENG
Shari Zinik, COS
Wanda Penovich, SOM

PAM Advisory

We are looking for people to serve on the **PAM** Advisory Committee. This committee will convene as-needed to influence the direction and resulting deliverables of PAM initiatives. A high level description of the PAM Initiative was explained. The **PAM** executive sponsors are the Associate Vice President of Research, the Associate Vice President of Financial & Business Services, and the CIO.

Liaison

The ability to update the Liaison on Activities and Projects was demonstrated using a new self-service application. This is accessed through the **Chartfield** application on the FBS pagelet. A **FBS News Post** was published with more details about it. This new self-service application will enable departments to easily maintain Liaison information, which will be used more and more in communication from central offices. Grants Accounting plans to start sending out the “90 Day” letters ALSO to Project Liaisons in a few months. BPAG members were encouraged to use the function to clean up years of “old data”.

CAS

Central Authentication Service (CAS) is a new way to access web applications that previously required CIS login. Now users can access a web application through a bookmark or link in an email, without logging in to CIS. Users will be presented with a Login screen, then be taken directly to the application. This has been added to some of the FBS Web Applications like **e-Journal**, **Chartfields**, **Accounting Calendar** and more. Not all applications have the CAS authentication added to them yet, but the goal is to “CASIFY” all the web applications.

Supplier Directory

The **Purchasing Department** has made improvements to the **Supplier Directory** on its website. Vendors can be looked up alphabetically or by category. Additionally, small icons are displayed by each vendor to indicate attributes of each vendor. These are:

- On Campus Supplier
- State of Utah Contract Supplier
- U of U Contract Supplier
- Small Business
- Best Value in Category

Each vendor has its own page with many additional details that are helpful in choosing and using the vendor.

Signature Authorization Form

Account Executives are required to gather signatures on a "**Signature Authorization Form**" of those that are authorized to sign for financial transactions for Departments, Activities and Projects. This process can be cumbersome, especially for a person who may be an Authorized Alternate on many Activities or Projects. Each time a person is added or removed from those authorized to sign on behalf of the Departments, Activities or Projects, a new signature card must be created.

A project is underway to improve this process. Signatures would be collected one time and imaged into the system. An application would be created allowing Account Executives to identify who is authorized to sign for them. This application would be linked with the signature, so that the signature would only need to be collected once.

Cost Transfers

University Policy 3.20 requires that all cost transfers against federal projects be documented by adequately explaining all transfers made TO or FROM federal projects. The policy also requires that transfers be made promptly after the error is discovered, but in any event, the transfer must be made within 120 days after the date the cost was incurred and prior to submission by the accounting department of the final Report of Expenditures.

A discussion about cost transfer was held. The University has a goal to simplify the process and make it easier to use this process. Contact Bob Turner at bob.turner@admin.utah.edu with ideas and suggestions.