

Business Process Advisory Group – February 14, 2014 – INSCC Room 110

Attending:

Ann Blanchard, UGS	Anne Maxwell, FAO
Bob Schirmer, FBS	Bobbie Harris, COE
Carl Larson, FBS	Dana Grant, FBS
Dave Bardsley, PHARM	Dawn Atterbury, FBS
Dean Church, FBS	Deb Larson, FBS
Debbie Carter, PED	Frederick Hon, HU
Glendon Mitchell, FBS	Georgette Kimberly, FBS
Hedy Hu, FBS	Jane Scott, FBS
Jason Atuaia, SOM	Jennifer Long-Pratt, FBS
Jessica Kieper, SOM	Jim Turner, EIHG
Josephine Rudd, FBS	Judy Chan, FBS
Julie Gerstner, COE	Julie Oyler, DENT
Kami McNeill, SOM	Kellye Potter, PED
Leslie Bigler, CMES	Linda Reed, HSC
Margaret Tennant, USTAR	Margo Bonnette, COH
Marilyn Burton, SOM	Marv Hawkins, USS
Michelle Addison, CFA	Nora Ishihara, KUED
Pam Mollner, IA	Pam Webb, FBS
Perry Hull, FBS	Rachel Tennyson, PMDP
Sally Petersen, FBS	Shaun DelliskaveDFPM
Shelley Kruger, CPPA	Sheralyn Stevens, MEDIA
Steve Allen, FBS	Susan Shult, FBS
Todd Kapos, FBS	Tran Trang, EHSL
Utahna Miller, DESB	Yuka James, LAW

System Issues

Two issues have been reported to FBS recently.

- The spyglass in Management Reports was not working on some 2014 documents. This was corrected within a few minutes of FIS being notified of the issue.
- The “PARS by Department” FIL was not bringing back complete results. The issue was identified and corrected within 2 days.

Both of these issues demonstrate the importance of communicating to FBS when applications are not working correctly. A “[FBS Web Applications Status](#)” page has been created to look up known issues with applications. If the issue is not listed on the page, click on the “[Report it here](#)” link to notify FBS of the issue.

10:25

This meeting will now end at 10:25 AM to accommodate a request by another department to use the room at 10:30 AM.

Asset List by Org

A BPAG member communicated to FIS that the “Asset” lookup application on the FBS pagelet did not bring back enough information to help departments manage their assets, specifically Asset Location. A potential FIL was demonstrated which included Asset Location. Other suggestions were made which will be investigated to see if they can also be implemented. BPAG members will be notified when this new FIL is available.

Project Revenue

The Grants Implementation project changed how Revenue was presented on Management Reports and the Evidence of Review application. A discussion about how Revenue is recognized for the various types of projects was transpired. Several ideas were discussed. As this is studied, communication about to easier understand Revenue will be sent to the campus.

Correcting Financial Transactions

The best way to correct Financial Transactions is to do it correctly the first time. Cost Transfers have are currently being used to correct transactions with Projects. FBS has been examining the processes involved with Cost Transfers. A *proposed draft* of the new process was demonstrated.

Grant Authority

Financial & Business Services has been analyzing the whole Procure to Pay (P2P) process. A proposal has been submitted to UIT that came from this effort. This proposal would make the Signature Cards an electronic process. Features include:

- Capture signature once
- Add/Remove Authorized Alternates without filling out a new signature card each time
- All individuals authorized to sign a financial document could be looked up in the new application.

FBS will give status updates to the BPAG group on this new proposal.

Open Discussion

A new payment method (SUA) is coming soon. This new method will pay vendors using a virtual credit card. Vendors are being notified of this new method. Details to come.

BPAG members were concerned that campus was not notified that changes to the PAR distribution process were made. Beginning with the 2nd Quarter PAR's (quarter ending 12/31/2014) of this year only exempt individuals who had effort on a Fund 5000/5999 Project received a PAR. Prior to that in many "research oriented" Departments, individuals who did not have a Project but had effort on State Appropriated Activities (Fund 1001 & 6100) also received a PAR. This change resulted in ~35% fewer PAR's being generated. Departments can still request that individuals always get a PAR by contacting **Cost Accounting & Analysis (Robert Doerr)**.

Next BPAG Meeting – March 14, 2014