Business Process Advisory Group – November 14, 2008 – INSCC Building, room 110

Attending:

Aimee Wilson, Human Resources	Angela Brown, College of Science
Ann Blanchard, Undergraduate Studies	Bob Turner, Human Genetics
Bobbie Harris, College of Engineering	Bryan Harman, ACS
Carl Larson, FIS	Catherine Coda, College of Nursing
Corky Richardson, ACS	Dave Bardsley, College of Pharmacy
Dean Church, FIS	Doug Kenner, ACS
Fredric Hon, College of Humanities	Gary Gledhill, Grants & Contracts Accounting
Greg Hughes, Human Resources	Jim Urry, ACS
John Downing, Accounts Payable	Julie Oyler, School of Medicine
Karineh Hovsepian, College of Fine Arts	Kevin O'Keefe, Human Resources
Kristin Jensen, Human Resources	Laura Marks, College of Education
Leslie Bigler, College of Mines & Earth Sciences	Magali Coburn, Scientific Computing
Margaret Tennant, USTAR	Marilyn Burton, Neurobiology
Marilyn Cox, College of Social & Behavioral Science	Mark Winter, Budget and Analysis
Marv Hawkins, ACS	Matt Hunter, Biology
Matthew Morris, Human Resources	Nancy Smith, Marriot Library
Nora Karst, KUED	Sandy Gunderson, Purchasing
Sandy Hughes, Budget and Analysis	Shari Zinik, Chemistry
Steve Allen, General Accounting	Utahna Miller, School of Business

Last Meeting Follow-up

The ability to view the images of Printing Services' invoices will be in production on WEB Management Reports using the "spyglass" next week.

Plant Operations is now posting to the General Ledger out of their new work order system. Discussion was held on the proper use of Accounts. We plan to invite Plant Operations to the December BPAG to answer some of these questions.

New WEB Server for Financial WEB Applications

Financial WEB Applications are now being hosted on a new server. If you have any issues with Financial WEB Applications, please contact someone in Financial and Business Services.

Position Management

PeopleSoft Position Management can track positions using definitions of each position. This will help the University to know what the true needs are. This will enhance the budgeting process. A presentation (see attached) was given by Human Resources explaining how this will work. The initial phase of Position Management will be implemented in the Hospital and Clinics.

Applicant Tracking

Human Resources discussed the issues they have had with Applicant Tracking. The current software is not providing the University with the level of tracking needed. Human Resources is using focus groups to determine the needs to track applicants. They have invited four vendors demonstrate how their products can fulfill the needs of the University. Members of BPAG are invited to participate in the process.

Background Checks

HR is moving towards paperless Background checks. An online tool will be available to perform background checks on future hires after the offer has been made. http://www.utahsbr.edu/policy/r847.htm is the requirement by the Board of Regents for background checks. A discussion followed concerning the cost and need for background checks. Concerns regarding student recruitment where jobs were promised in graduate programs were raised. Other types of background checks are currently being used. Question was raised, does this new check replace or is it in addition to other background checks? (See addendum at end of minutes for comments)

Aggregate Tax Method

Tax payments are based on the total amount of **all** pay in a pay period. Extra payments made during a pay period i.e. cell phone allowances, bonuses, etc. are all part of the amount used to calculate federal and state withholding in a pay period.

Enhanced D-Jobs

D-Jobs has been enhanced so that it automatically checks all jobs in an ORG for complete distribution.

Transparency Board

The state will be hosting a website that citizens can go to and find out how their tax dollars are being spent. The University will be required to provide financial data to the state to make this possible. The state is planning on this website going live in May 2009. See attached presentation.

Open Discussion

A discussion about the open Vice President of Human Resources position and potential changes to who HR reports to was held. As a group, BPAG will remain neutral. Each college is encouraged to make their opinions known (whatever they are) to the search committee through the appropriate channels (i.e. the Deans).

Next BPAG Meeting – December 12, 2008

Addendum to Background Checks from Human Resources

- Reviewed R847 policy and definition of "employee" as specified in the policy. Discussed number of Campus Staff hired in Calendar Year 2007, approximately 6,000.
- Reviewed content of a CBC: SS trace, County of Residence criminal history search, Sex Offender Registry, up to 3 aliases, at a cost of $22.50.
- Reviewed new paperless process which will require minimal staff training.
- Provided overview of Accurate Background, which provides screening services for Microsoft, Amazon.com, Spelman College and other companies and institutions.
- Covered implementation date of May, 2009.
- Discussed potential requirements to background students, RAs, and TAs and budget implications.
- These issues are still under discussion by a group headed by Susan Olson.

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Project Updates for BPAG

- Position Management
- Applicant Tracking System

Wednesday, November 19, 2008

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Position Management Overview

The Position Management business process helps you define your organization by position, rather than job or by employee.

The view of your organization becomes not the people filling the chairs but the available chairs in your organization filled or vacant.

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With Position Management, you will be able to:

- Create and track position data and history.
- Maintain, view and report on incumbent data.
- Identify, view and report on filled and vacant positions.
- Provides position data to be used in the budget decision-making process.

Phase 1 - Position Management Foundation Goals

1. Hire, Job Changes and Requisitions by Position

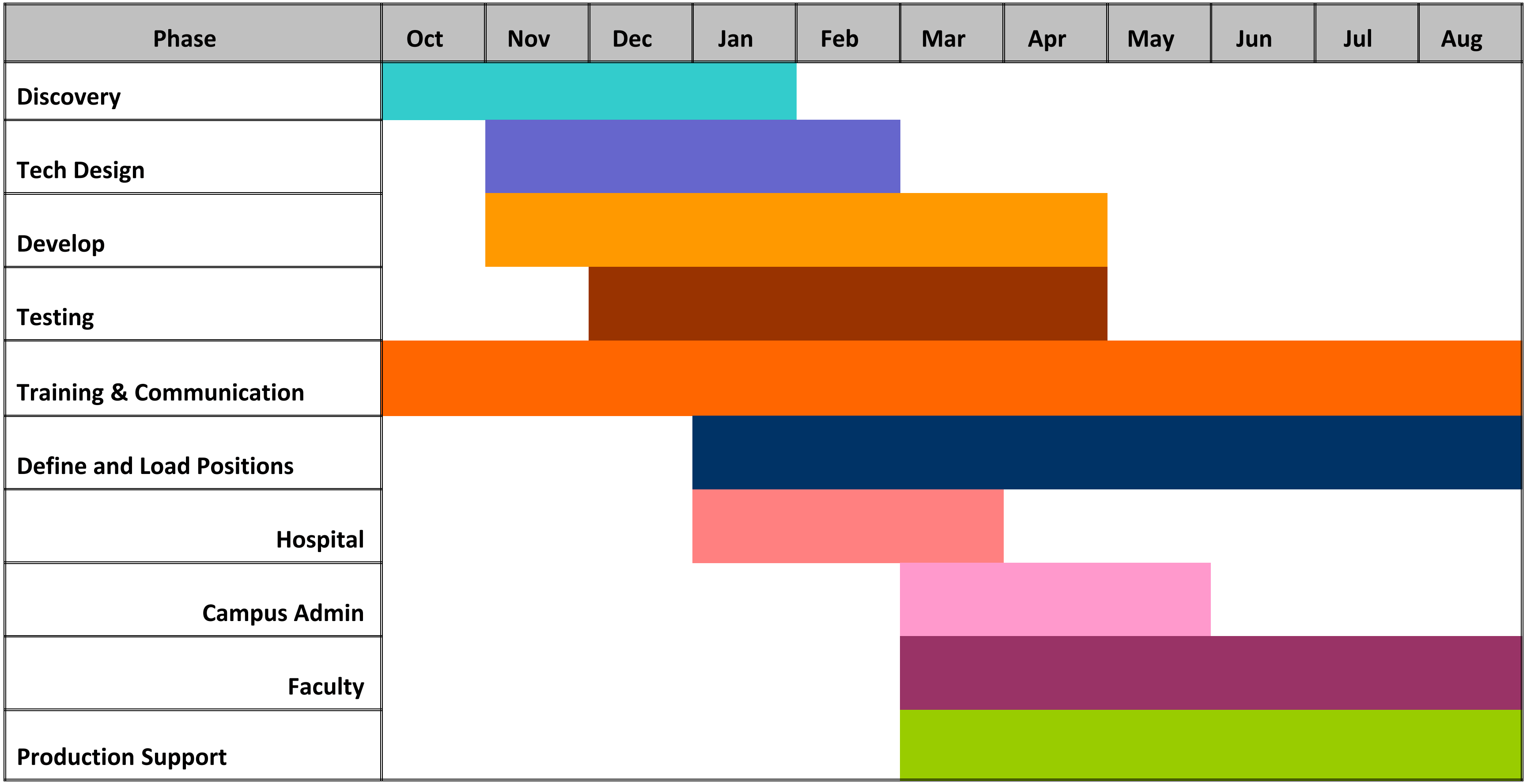
2. Ability to view and report on
    - Position History
    - Incumbents
    - Vacant and Filled Position

3. Identify Budgeted and Unbudgeted Positions

4. Generate Organization Charts

5. Provide data to assist in managing by FTE

Current Timeline



Things that will not Change in Phase 1

1. Labor Distribution will remain on the Employee record not by position.
2. Commitment Accounting and GL interface will not change except for adding Position Number to the transactions to assist in reporting cost by position.

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Manage Positions Integrations

- Integrates with PeopleSoft HRMS applications, with other PeopleSoft applications, and with third-party applications.

- Data in the Position Management tables is available to any PeopleSoft application.

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Position Management Project Team

- Project Sponsors
    - Gordon Crabtree
    - Paul Brinkman
    - Phil Johnson
- Project Management
    - Aimee Wilson
    - Kevin O’Keefe
- Technical Leads
    - Bryan Harman
    - Doug Kenner
    - Marv Hawkins
- Core Project Team
    - Kirt Hunter
    - Josna Kotturappa
    - Wendy Sabir
    - Chelsea Schultz

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Applicant Tracking System Overview

Our goal is to fully address the institution’s talent acquisition requirements

An alternative to our current approach (i.e. Candidate Gateway in its current form)

Currently we are investigating 4 vendors including PS

We are looking at the feasibility of implementing the “vanilla” version of CG but feel a complete replacement is likely

Applicant Tracking System Approach

- Stakeholder feedback sessions to identify requirements
- Development of a requirement/vendor decision matrix
- Vendor demos and evaluation
- Decision and implementation
- We are currently underway but the current timeline is tbd

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Applicant Tracking System Project Team

- Project Sponsors
  - Kristin Jensen
  - Joan Gines
- Project Management
  - Kevin O'Keefe
  - Greg Hughes
- Technical Leads
  - Bryan Harman
  - Doug Kenner
  - Marv Hawkins
- Core Project Team
  - Stacie Rigby
  - Josna Kotturappa
  - Heather Molyneaux
  - Emily Gardner

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Questions?

TransparentUtah.Gov

Financial and Business Services

November 2008

Utah Code Section 63A-3-403

- Utah Transparency Advisory Board
  - Seven members
    - Division of Finance
    - Governor’s Office of Planning and Budget
    - Judicial Council
    - Legislative Fiscal Analyst
    - Member of Senate
    - Member of House of Representatives
    - Department of Technology Services

63A-3-403 (cont'd)

- Board responsibilities
  - Oversee the implementation of the State's transparency website
  - Determine the public information to provide
    - Must be classified as public under GRAMA
    - An accounting of monies, funds, accounts, bonds, loans, expenditures, or revenues **regardless of the source**

63A-3-403 (cont'd)

- Board must consider
  - The cost effectiveness of providing the information
  - The value of providing the information to the public
  - Privacy and security considerations

63A-3-404 – Division of Finance

- The Division of Finance has ability to create rules governing how this will work for each entity
- May require the following information for expenditures:
  - Name of entity making the expenditure
  - Name of person receiving the expenditure
  - The date of the expenditure
  - The amount of the expenditure
  - The purpose of the expenditure
  - The name of each party to the contract
  - An electronic copy of the contract
  - Or any other criteria designated by the rule

63A-3-402 – Utah Public Finance Website

- Will permit Utah taxpayers to view, understand, and track the use of **taxpayer dollars**
- Free
- Searchable
- Provide access to financial reports, audits, budgets, or other financial documents used to allocate, appropriate, spend, and account for government funds

63A-3-402 (cont'd)

- Financial information for the fiscal year beginning July 1, 2008
- Go-live **May 15, 2009**

Examples

- Alaska - Checkbook Online
- Oklahoma - Open Books
- Univ of Texas - Expenditure Transparency
- Missouri Accountability Portal
- USAspending.gov

Timeline

November – finalize U blueprint to Division of Finance specs

December – begin building test file

January – U staff review test data for issues/concerns/anomalies

February – provide test file to Division of Finance

May 4 – “soft” go-live

May 11 – go-live

May 15 – statutory go-live

How can you help?

- Feedback on ORG levels presented (more next BPAG mtg)
- Feedback on privacy issues or other areas of sensitivity
- Suggestions for communicating across campus
- Communicate within your areas (calls will be forwarded to areas!)