Business Process Advisory Group – November 13, 2015 – INSCC Room 110

Attending:

Alayne Merrit, FBS	Ambra Gagliardi, LIB
Angela Simmonds, COS	Ann Blanchard, UGS
Ann Buffington, ADM	Anne Maxwell, FAO
Bruce Newmann, UNP	Carol Bierschwale, ARCH
Chuck Piele, IA	Colette Brown, FBS
Clay Postma, UIT	Craig Merritt, FBS
Darrin Robertson, FBS	Dave Bardsley, PHARM
Dean Church, FBS	Dennis Laros, PSYCH
Fed Hon, HU	Hedy Hu, FBS
Jane Scott, FBS	Janet Ellingson, CHPC
Jared Olney, PED	Jennifer Long-Pratt, FBS
Jennifer Zenger, SRI	Jim Turner, EIHG
Jim Urry, UIT	Joan Gregory, EHSL
Josephine Rudd, FBS	Judy Chan, FBS
Julia Harrison, CHPC	Karren Nichols, SUS
Kay WIlden, BIOCH	Kelly Peterson, FBS
Ken Erickson, FBS	Kimberly Adamson, HSC
Kristine Van Ausdal, FBS	Linda Jensen, OPHTH
Magali Coburn, SCI	Marcia Cook, CSME
Margaret Tennant, DNEUR	Marilyn Burton, SOM
Mark Patterson, FBS	Marv Hawkins, USS
Mary Snow, USS	Mary Ann Howard, SCI
Matthew Castillo, CFA	Megan Warren, NURS
Michelle Addison, MUSIC	Niloofar Bakhti, EHSL
Rachel Staheli, NURS	Reena Pamarthi, FBS
Rose Simper, ED	Runar Boman, FBS
Sandy Hughes, BUD	Sarah Alexander, BIOCH
Scott Patten, FBS	Shelly Kruger, CPPA
Susan Dudley, FBS	Sydnee Scarborough, SW
Tanis Garcia, COMP	Tran Trang, EHSL
Utahna Miller, DESB	Victoria Medina, MPA
Wendy Kwan, SOM	Ying He, FBS
Yuka James, LAW	

Project Budget Detail

A new report (Proj Budget Acct Entry Details) has been created in the **Financial Information Library** that shows all of the Project budget detail entries. The account description returns in the Description column. On Subawards, if GCA had the correct information at entry time, that information will also appear in the description. This report lists all of the budget entries Project-to-date, and is located in the "GRANTS/CONTRACT" folder.

Group Conferences and Catering

New checklists and a new **webpage** have been created to help with scheduling **Group Conferences and Catering**. If the caterers total cost is above $5,000, submit a requisition to Purchasing. The checklists will help with the requirements for catering or holding a conference. The page can be found by clicking on the **Group Conferences and Catering** link on the **Purchasing** home page.

Electronic W2

Employees can sign up to get their **W2 faster** by selecting to receive the W2 electronically. Advantages are:

- Employees will be able to access the W-2 up to a week earlier, because they will not have to wait for it to be delivered in the mail.
- Employee's sensitive personal information will not be sent through the mail.
- Green – natural resources are saved by not printing and mailing W-2 forms.
- Budget Savings – In these tight budgetary times, this will have a positive impact on the budget of the University.
- Employees may still print the PDF if a printed copy is desired.

Departments can find out who has elected to receive the W2 electronically by running the "W2 - Electronic Consent" report in the CURR EMPLOYEES folder of the **Financial Information Library**.

ePAR

The ePAR rollout has been hugely successful and has already changed our ability to manage and more effectively drive the certification of effort reporting each quarter to be compliant with the University's effort reporting policy. **Metrics** for the ePAR application were presented. Highlights include:

- ePAR compliance was at 72.4% for last quarter compared with 60.6% for the previous quarter.
- Compliance had been below 30% prior to the ePAR implementation.
- Only 6.5% of PARS had not been started.

Click here to view the complete metrics.

Paper PAR's and ePAR's submitted more than 120 days after they have been released that are returned with changes will no longer be automatically processed. If costs need to be moved on or off a project, the **Cost Transfer Decision Tree** shows the correct method to transfer the funds.

Annotating Management Reports

Wouldn't it be cool to make annotations on the Journal Detail of Management Reports? Plans are being made to add this feature in the future. The reviewer of Journal Detail could leave notations regarding the lines that had been reviewed. Details and requirements are in process and more should be known next year.

UShop

Feedback is very important to Financial & Business Services. The UShop team has gathered feedback from departments. The University of California San Diego (UCSD) was invited to campus to evaluate our process. They have been using SciQuest (the platform UShop is built on) for 10+ years. SciQuest was also invited to visit and evaluated how the software has been implemented. Information gathered from departments, UCSD and SciQuest was presented.

Highlights from feedback:

- University financial approvals integrated with electronic workflow
- Catalog supplier marketplace very easy to use
- Need more punch-out catalog suppliers
- Non-catalog form cumbersome to use
- Implement search functionality immediately.
- Provide more clear guidance to campus departments regarding when to use a Pcard, and when to use UShop.
- UShop pricing sometimes not competitive

- UShop team is comprised of a committed team of individuals, with a breadth of experience.
- The UShop training program and content is above average.
- Implementing eProcurement is a long-term project.

Refining plan highlights:

- Catalogs will be expanded, with more punch-out catalogs added, and hosted catalogs implemented.
- Product search will be enabled, and implemented in a way that facilitates easy product searching across many catalogs.
- A UShop user group will be created, establishing partnerships with key departmental representatives.
- The UShop Help Desk will be expanded and improved.

[Click here](#) to view all the feedback and the Refining plan.

Next BPAG Meeting — December 11, 2015