Business Process Advisory Group – October 9, 2009 – INSCC Room 110

Attending:

Angela Brown, College of Science
Bobbie Harris, College Of Engineering
Bryan Harman, ACS
Catherine Coda, College of Nursing
Corky Richardson, ACS
Earl Lewis, Network & Communication
Fredric Hon, College of Humanities
Kevon Balls, ACS
Laura Marks, COE
Marilyn Burton, Neurobiology
Mark Winter, Budget and Analysis
Mary Weight, FBS
Nora Karst, KUED
Sandra Bruhn, College Of Engineering
Sandy Hughes, Budget and Analysis
Sheralyn Stevens, UEN/KUED
Todd Kapos, FBS
Virginia Beane, College of Law

Ann Marie Breznay, LIB
Bruce Neumann, Development Office
Carl Larson, FBS
Cindy Braegger, School of Music
Dean Church, FBS
Ethan Hacker, KUEN
Gary Gledhill, FBS
Kirt Hunter, Human Resources
Margaret Tennant, USTAR
Marjorie Goodrich, Internal Audit
Marv Hawkins, ACS
Nola Lucke, FBS
Rebecca Baggett, FIS
Sandy Gunderson, FBS
Shari Zinik, COS
Tami Garff, Academic Affairs
Utahna Miller, School Of Business
Wanda Penovich, School of Medicine

Last Meeting Follow-up

- Signature Card changes – Progress has been made in addressing the business process of making changes to existing signature card forms. We hope to have a smoother solution in the coming months.

Campus Directory Update

The Campus Directory WEB application is being re-written. The *Beta* version is located at: http://people.utah.edu/. The *Beta* version was demonstrated. BPAG members are encouraged to use the *Beta* version and give feedback to: Dir-beta@unite.utah.edu. If a BPAG member wants to be part of the volunteer effort to help with *Beta* testing, send an email to: earl.lewis@utah.edu

- Improvements include:
  - Single Box search.
  - Employees who go by middle names can be located.
  - Unknown spellings can be found because of Soundex technology.

ARRA ARRA Update

- The first ARRA report is due to the Federal Government by October 10, 2009. The University of Utah has met that deadline. Reports are due quarterly on the 10th of the month following the end of a quarter.
- Project Lookup now has the ability to search for ARRA projects.

e-Journal Update

- Demonstration of the web interface application:
  - Journals pending action by you are displayed on the main screen
  - Creation of new journal demonstrated
  - Ability to share journals demonstrated
  - Departmental Approvals will follow the same guidelines currently in place

EBT Update

- Activity and Project by ORG EBT's are in the final stages of development and should go live after security is setup.
- EBT by BU 02 and 03 is in development.
- "Troubleshooter" EBT – Query by given employee is in development.
- Question on if the payroll distribution dates/% are being used on the Encumbrance reports. There was consensus that the data is needed, but it should be omitted on the FIL/HRIL encumbrance EBT's in cases where the employee has multiple distributions on the same chartfield. It is more important that the FYTD Actuals and Encumbrance amounts are accurate.

Going Back (Forward) in Time

- Adding arrows to the month on Management Reports, so the user can go back or forward by a single month was discussed. The group thought this was a good idea.

Excel Pivot Table Demo

- Pivot tables in Excel were demonstrated. Pivot tables can be valuable when analyzing EBT data or any other data you wish to summarize. (PowerPoint Presentation follows minutes)

"Sortable" columns in UofU WEB Apps

- A new sorting feature was demonstrated for the UofU WEB applications. If the shift key is held down while selecting columns, multiple sorts can be applied. The sorts are ordered in the sequence they are selected after the shift key is held down.

Open Discussion

- A/U in PCard Reallocation is functioning properly.
- New HRIL available. You can now see which employees have made an election on how to receive their W-2's.

Next BPAG meeting – November 13, 2009

Excel Pivot Tables

It Just Might Be an EBT's Best Friend...Let's find out!

GETTING STARTED

#1. Go to the CIS Home Page / Financial Library Download / EBT Reports / EBT by Activity

#2. Download Information to Excel

#3. Now, Go to "Insert" tab and insert a pivot table

#4. Quick Introduction to Pivot Tables

Pivot tables - Pro's and Limitations

Pro's –

- Easy

- Accurate

- Quick

- Great for analysis

- Wonderful for summarizing large data pools

Limitations

NONE! Oh, if only it were true…

- Customization

SOME POSSIBILITIES USING PIVOT TABLES - EBT – Basic Layout

Employee Name by Row
Chartfield by Row
Period by Column
Total Amount - by Values

<u>OR</u>

- **Department (Activity Title) and Name Layout - Etc...**
- **Department** (Designated "Activity Title") by Row
- **Employee Name** by Row
- **Chartfield** by Row
- **Period** by Column
- **Total Amount** - by Values

LABOR LAYOUT

- **Department** (Designated "Activity Title") by Row
- **Activity** by Column
- **Account Number** by Column
- **Total Amount** - by Values

BENEFITS LAYOUT

- **Department** (Designated "Activity Title") by Row

- **Activity** by Column

- **Account Number** - "59000" - by Column

- **Total Amount** - by Values

SUMMARY INFORMATION
(By Activity, By Account #, % Benefits per Employee, Phone Stipends)

- **By Activity**
  - Activity by Column
  - Total Amount - by Values
- **By Account #**
  - Account by Column
  - Total Amount - by Values
- **% Benefits per Employee**
  - Customized Field
- **Phone Stipends**
  - Various Ways

ISOLATING ACCOUNT NUMBERS OR DESCRIPTIONS
(aka…Overtime, Add Comps, Sick Pay etc…)

- **Period** by Column
- **E/D/T Descri** - Row
- **Total Amount** - by Values

<div align="center">

OR

</div>

- **Account Description** - Row
- **Account Codes** - Row
- **Period** by Column
- **Total Amount** - by Values