

Business Process Advisory Group—October 12, 2012—110 INSCC

Attending:

Amy Tanner, SOM	Angela Sullivan, CFA
Anita Bowler, HCI	Bob Schirmer, FBS
Bob Turner, FBS	Bobbie Harris, COE
Bryan Harman, USS	Carl Larson, FBS
Carol Hsieh, FBS	Chuck Piele, IA
Darrin Robertson, FBS	Dave Heaps, FBS
Dean Church, FBS	Gary Emery, FBS
Gary Gledhill, FBS	Glendon Mitchell, FBS
Jane Scott, FBS	Janet Ellingson, CHPC
Jason Moeller, USS	Jennifer Long-Pratt, FBS
Jenny Lind, ARCH	Jeri Schryver, ICSE
John Levandowski, USS	Josephine Rudd, FBS
Julie Gerstner, COE	Ken Erickson, FBS
Leatha Allred, COS	Linda Reed, HG
Liz Porter, BIOEN	Margaret Tennant, USTAR
Margo Bonnette, COH	Marilyn Burton, SOM
Marv Hawkins, USS	MaryAnn Howard, SCI
Matt Hunter, COS	Mike Olsen, FBS
Nora Ishihara, KUED	Perry Hull, FBS
Rachel Tennyson, PMDP	Rebecca Baggett, FBS
Sandy Gunderson, FBS	Sandy Hughes, BUD
Shari Zinik, COS	Steve Allen, FBS
Stuart Kasten, FBS	Susan Wolfe, ARCH
Utana Miller, DESB	

Change

Change was discussed. Examples of recent changes were used to introduce the upcoming changes to the Management Reports. The Grants implementation is a driving factor behind these changes.

Revenue & Expense by Budget

Reporting in Grants will now be done by Budget Category. Because of this the Management Report Summary of Revenue and Expense needed to be redesigned. (The other reports in Management Reports will stay the same) The new report will be titled; “Revenue & Expense by Budget Category” will have these features:

- Organized by Budget Categories
- Type of project in header

- Message if:
 - Over Committed
 - Over Spent
- Print just this report as a PDF
- Print the whole Management Report bundle for the Account Executive
- Links to the new “Evidence of Review”

Evidence of Review (EOR)

A new online application was demonstrated, called “Evidence of Review” (EOR). Highlights of EOR include:

- The ability to view a statement with one line for each Projects/Activities for an Account Executive.
- Review the Activities/Projects for the Account Executive:
 - Review electronically, by selecting the Activities/Projects and choosing the button; “Mark Reviewed”
 - Create a pdf of selecting the Activities/Projects with a summary line for each that can be printed and signed.
- Create a PDF bundle for Activities/Projects that is similar to the current printed Management Reports. The bundle will be emailed to the person signed in to EOR. The bundle will include:
 - Balance Sheet
 - Summary of Revenue and Expense
 - Journal Detail

Next BPAG Meeting – November 9, 2012