Business Process Advisory Group – September 13, 2013 – INSCC Room 110

Attending:

Ann Blanchard, UGS
Bob Schirmer, FBS
Carl Larson, FBS
Darrin Robertson, FBS
Dean Church, FBS
Dennis Bryant, CSBS
Jake Pickett, SOM
Janet Ellingson, CHPC
Jayci Minjares, FBS
Jennifer Long-Pratt, FBS
Kami McNeill, SOM
Lance Bradshaw, PED
Marilyn Burton, SOM
Matt Hunter, COS
Robert Doerr, FBS
Utahna Miller, DESB
Bob Mutz, ARCH
Bryan Harman, UIT
Chuck Piele, IA
Dave Bardsley, PHARM
Deb Larson, FBS
Glendon Mitchell, FBS
Jane Scott, FBS
Jason Atuaia, SOM
Jennie Noren, HSC
Jeri Schryver, ICSE
Kellye Potter, PED
Laura Howat, FBS
Marv Hawkins, USS
Michelle Addison, FA
Sally Petersen, FBS

EDR Update

A pilot group has been using EDR since the July 31st pay period. Transactions are successfully processed each pay period. The application has successfully sent payroll reallocations to HR. If you would like to be part of the pilot group, contact **Robert Doerr**. Goal for general release of EDR to campus is late October. Training is currently being developed.

Evidence of Review

Electronic evidence of review is being used for about 50% of Activities and 40% of Projects. Other methods of review were discussed including:

- Shadow Systems
- Printing the "Indicate Review PDF"
- Creating PDF version of the Management Reports using the Evidence of Review application or Management Reports and annotating and approving on the PDF.

Updates to the Evidence of Review (EOR) application were demonstrated. Highlights include:

- Search by Account Executive *or* Org *or* both.
- Search by Org can be by number or name
- Org rollup

- Sortable Columns
    - Account Executive
    - Org
    - Fund
    - Activity/Project
- Filter by reviewed status
    - Both – all Projects/Activities whether reviewed or not
    - Reviewed – Projects/Activities that have been electronically reviewed using the “Mark Reviewed” button or printed a PDF using the “Indicate Review PDF” button.
    - Blank – all Projects/Activities that have not been reviewed using the criteria the second bullet.

The EOR tool should only be used to provide “Evidence” of review, not doing the actual review. See **Policy 3-003** - Authorizations and Approvals Required for Financial Transactions. Links in EOR open Management Reports which *can* be used to “Review” financial transactions.

The email sent each month to notify campus that the Accounting Month is closed and review of financial transactions can begin, is sent to all Account Executive, Principal Investigators and Liaisons of Activities and Projects. It is important these are kept current so the correct people are receiving these emails.

OPEN DISCUSSION

Updating Signature Cards each time there is a change in the department, causes extra work because all the signatures must be obtained again, not just the signature of the changed person. Resolving this issue is a priority of central administration.

Next BPAG Meeting – October 11, 2013