

Business Process Advisory Group – September 11, 2015 – INSCC Room 110

Attending:

Aaron Sparks, FBS	Alayne Merrit, FBS
Ambra Gagliardi, LIB	Ann Blanchard, UGS
Ann Buffington, ADM	Anna Alindogan, FBS
Anne Maxwell, FAO	Ashley Hisa, FBS
Bobbie Harris, COE	Dave Bardsley, PHARM
Dawn Atterbury, FBS	Dean Church, FBS
Dennis Bryant, CSBS	Elizabeth Woolsey, SOM
Fed Hon, HU	Gary Snow, FBS
Glendon Mitchell, FBS	Hedy Hu, FBS
Heidi Slack, FBS	Jane Scott, FBS
Jared Kirby, SOM	Jessica Little, FBS
Jim Turner, EIHG	John Levandowski, FBS
Jordan Burr, FBS	Julie Woodward, FBS
Kay Willden, BIOCH	Kelly Peterson, FBS
Ken Erickson, FBS	Kevin Ballard, FBS
Kristy Green, CAI	Marcia Cook, CSME
Margaret Tennant, DNEUR	Marilyn Burton, SOM
Mark Patterson, FBS	Marv Hawkins, USS
Mary Snow, USS	Mary Ann Howard, SCI
Michelle Addison, FA	Niloofar Bakhti, EHSL
Rachel Staheli, NURS	Reena Pamarthi, FBS
Scott Patten, FBS	Shelly Kruger, CPPA
Tran Trang, EHSL	Wendy Speers, FBS
Yuka James, LAW	

Research Portal 2.0

This is a beta release of a web application that allows users to view submitted proposals and awards received. This is available from at the “Research Administration” pagelet of the CIS. Several features (selectable columns being one of the “favorite”) were demonstrated. BPAG members were encouraged to use it and give feedback to OSP. There is an email contact link in the footer of the application. Several questions/concerns were asked, including:

- What about “Co-PI’s”?
 - CO-PI’s are not currently capture in the system.
- Account (Project) Executives? (Those rare situations where the PI and the Account Executive are different).
 - We will take this back and see about incorporating this into the application.

- How far back is the data?
 - ~2006, the implementation of Grants Pre-Award.
- A concern was raised when data is updated as it may change historical reports. It was discussed that this is the nature of this kind of data. There is not a true “cut-off”, similar to financial cut-offs.
- There is data in eProposal that is also beneficial. It was mentioned that it makes sense to get access to eProposal for Business Officers.
- In the future the actual Notice of Award (NOA) will be attached and accessible as part of the application.
- Clarification around awards extensions. OSP and GCA will look at leveraging the Project Comments to clarify these scenarios.

PCARD Statements

[Click here](#) for a communication that went out with the August PCARD statements. The U’s PCARD program is one of the largest ones in the state. The Approval process is key to preventing misuse and fraud. Some key areas of emphasis:

- Timely review of PCARD charges (recommend at least weekly)
- Documenting the Business Purpose
- Suggestion that in addition to the PCARD Office emailing the Card Holder and the Supervisor about questions or issues, that the Reallocator also be emailed.
- Concern that some merchants require and keep the original receipt when doing a return. What should the “original receipt” requirement be in these cases?

GCA Update

Dawn Atterbury, Manager of GCA, discussed the following:

- Reminder that when spending against a budget category that is normally restricted that the budget for that category must be set up. These categories are available on the budget setup.
- During the proposal process the funding agency often asks for information that is covered in the annual A-133 Audit “[Letter and Report](#)”
- The “[120+ delinquent supplier list](#)” was demonstrated. This requires you CIS login to access.
- BPAG members were encouraged to use the “Change Liaison” feature of Project lookup.
 - PI’s and AE’s can only be changed through OSP
- BPAG members recommended that Project Lookup be improved by repeating the column headings (for long lists) and doing something similar to the dynamic column select feature of Research Portal 2.0.

USHOP Update

Perry Hull, USHOP Solutions Administrator, answered some questions regarding the U's new eProcurement system (USHOP). An update regarding USHOP will be a standing agenda item for the next several BPAG meetings. A couple questions that were raised:

- The ability to search by ADSC description
- Expanding the vendor options (e.g. more catalogs)



Business Intelligence

A high-level discussion regarding the role of BI tools was held. Specifically ideas for what type of reports could help staff make financial decisions. Some of the ideas:

- Project BBA monthly trends. Calendar year or Fiscal Year.
- Comprehensive PI reporting.
- Similar reports to the F&A reports provided by Mark Winter.
- Similar reports to the financial reports created by MBM
- Employee data, including Benefit Rates
- Income Accounting report detail
- Cylinder Demerge detail
- Summary of Proposals
 - Acceptance
- Cash Balance
- Over expended report
- Over Committed reports

Open Discussion

- EOR – Make more columns sortable
- Travel System
 - System timeout
 - “Student” button
 - Search by Traveler

Next BPAG Meeting—October 9, 2015