

UNC Finance Improvement and Transformation (FIT) Update

UNC Shared Services Payroll

December and January were busy months with UNC Shared Services Payroll as well as the campuses. There were year-end adjustments, annual flexible benefits load, calendar year-end leave roll and W2 processing. Four of our campuses piloted the reporting of payroll metrics, three campuses reviewed the standard model monitoring results and planning for the implementation of position control began with one campus. The FIT team continues to work on enhancements to both leave reporting and the HR Payroll Active Collab repository, as well as providing ongoing support to each of the nine campuses.

UNC Human Resources Data Mart

Campus Data Mart submissions for the months of December and January continue to improve as does the completion of required data elements. Planning for Phase II of the HR Data Mart has begun. Two new work groups have been established for the purpose of evaluating (1) non permanent type employees who should be incorporated into the Data Mart and (2) additional data elements that are needed to meet the reporting requirements for the annual Personnel Data File (PDF). We continue to work with the Office of State Personnel on the cut-off of the State's Personnel Management Information System (PMIS) and with the Office of State Controller on accessing historical university personnel data through the State's BEACON Business Intelligence (BI) module. Campus and General Administration representatives were trained on this module during the month of January.

Business Process Improvements and Financial Monitoring

UNC FIT monitoring visits are scheduled on each campus during the months of February and March. There will be dual track monitoring with the new process reviews (Capital Assets and Student Accounts) led by the system process owner and the existing process reviews (Financial Aid, General Accounting and Contract & Grants) led by a GA finance/audit team. In preparation for the visits all campuses submitted updated compliance checklists for each of the five processes and will gather required documents for review during the visit. A follow-up report will be provided to each campus. The FIT team will use these visits as opportunities to examine any adjustments/enhancements that might be warranted in our capture and reporting of key performance metrics and in potential enhancements to the standards. The Financial Dashboard for the period ending September 2011 was distributed in December.

UNC E-Procurement Initiative

UNC FIT launched a formal project in December to expand the UNC E-Procurement Initiative that will maximize the University's return on investment. An E-Procurement Advisory Team and process lead were established. The recruitment of a joint UNCGA Purchasing Officer / UNC Systems Procurement Officer position began and is anticipated to be filled by mid February. A campus spend analysis survey is expected to be complete by the end of January to

identify opportunities to generate savings by electronically enabling UNC's strategically aligned contract and catalog priorities. The strategic sourcing enhancements will expand the current inventory of ten UNC system vendor catalogs to twenty plus catalogs by June 30, 2012. The SciQuest tool creates a single portal for campus purchase to payment processes. Also, UNC SciQuest's tool creates a single repository for both state and UNC specific contracts that can be sourced to a vendor using our best negotiated price. Additional evaluation is being conducted to explore SciQuest's electronic forms enablement that can create electronic workflows for specific procurement, payable, and other business service workflows that are now being performed manually. The project team also plans to develop a return on investment annual report for E-Procurement savings, KPIs, and performance measures.