

## **UNC Finance Improvement and Transformation (FIT) Update**

### **UNC Shared Services Payroll**

- Continued to successfully operate nine campuses on the UNC shared services payroll model. Completed all year-end processing, including W-2 generation and year-end filings.
- Implemented the enhanced web time entry solution (Smart Time) at UNCP in October 2012. The solution is scheduled for implementation at UNCA, ECSU and WCU in FY 2013.
- Continued trial reporting of Payroll key performance indicators during second quarter 2013.

### **UNC Human Resources Data Mart**

- Partnered with Human Resources, Information Technology and Institutional Research at UNC General Administration and across the system to enhance the UNC HR Data Mart. The solution provides a timely, accurate and user friendly tool to manage UNC's position/employee data for system wide analysis, reporting, and essential personnel compensation and budgetary policy planning and oversight responsibilities.
- Expanded the UNC HR Data Mart's original four views (employee, position, job and budget) to include compensation and benefit information in November 2012.
- Rolled out cross-campus reporting capability in late 2012 and continued development of public information human resource reporting for a 2013 roll-out.
- Continued development to ensure that the 2013 UNC Personnel Data File (PDF) reporting can be extracted from the UNC HR Data Mart to replace the current labor intensive processing.
- Made plans to develop additional security features in 2013 to provide more granular access based on roles and responsibilities.

### **UNC Business Process Improvements and Financial Monitoring**

- Distributed document request lists to campuses in preparation for 2013 monitoring visits.
- Confirmed monitoring visit campus schedules and logistics to begin in February and end in April.
- Incorporated key performance indicators for student accounts and capital assets into the first quarter FY 2013 UNC FIT Financial Dashboard.
- Met with the Office of State Auditor to discuss financial policy guidance, the role of external audits in the UNC Performance Funding Model and the new information system audit letters arising from financial statement audits.
- Collaborated with the NC Community College System to discuss their adoption of UNC FIT standards, KPIs, and monitoring approach to more effectively meet OSC's Enhancing Accountability in Government through Leadership and Education (EAGLE) program compliance standard.

### **UNC E-Commerce Initiative**

- Enabled five new consortia catalogs for FY 2013: Office Depot, Fastenal, Xerox Audio Visual Supplies, Staples Office Supplies and Staples Janitorial Supplies.
- Launched joint partnership with the NC Department of Administration in December to develop new strategic sourced state term contracts in the office supply, scientific and laboratory supply, and audio visual technology spend categories.
- Began development of an e-commerce return on investment (ROI), key performance indicators (KPIs), and related performance measures for the UNC system. Plan to pilot and refine these measures through the spring at UNCW, UNCCH and UNCC from January through March 2013. The remaining campus will adopt the e-commerce reporting requirement in June 2013.
- Worked with UNCW to develop SciQuest electronic workflow functionality for both direct payment and travel authorization actions.
- Initiated a project with ASU to implement electronic payment card functionality to provide an additional payment option to vendors beyond traditional ACH and check payment options.

- Began development of a plan to monitor and assist campuses with fulfilling the due diligence requirements for payment card industry (PCI) security compliance standards using OSC's Trustwave solution.

#### **Other UNC FIT Initiatives/Updates**

- Worked through the UNC FIT Student Advisory Team to identify a consistent format for collection of required military affiliated data to fulfill the UNC Serves initiative and to develop a plan for electronic transcript transfer functionality between UNC campuses and the NC Community College System.
- Worked with WSSU and ECSU to pilot the outsourcing of 2013-2014 academic year financial aid verifications in partnership with SEAA and College Foundation.
- Worked with UNC General Administration Information Technology and Academic Affairs to develop the process model for the Foreign Language inter-institutional consortia.
- Worked with UNC General Administration Information Technology and Institutional Research on the implementation plans for development of a UNC Student Data Mart.
- Continued development and enhancement of a data analysis tool originally received from George Washington University that identifies and removes duplicated identities from the Banner ERP system. Plan to test the solution at UNCP in January/February.
- Worked with the NC Department of Justice to enable campuses to upload past due account referrals into the Attorney General's portal through an automated process in the spring of 2013.