

2011 BRINGING ADMINISTRATORS TOGETHER CONFERENCE

Heather J. Haberaecker
Office of Business and
Financial Services

UIC UNIVERSITY OF ILLINOIS
AT CHICAGO

Empowering Performance & Achievement through Teamwork

Four Overarching Goals

- Improve communication, training and customer satisfaction with OBFS services
- Implement SB 51 and improve Purchasing experience for all
- Help users achieve more integrated and robust financial and human resources reporting solutions
- Leverage technology to work smarter vs. harder

Communications, Training and Customer Satisfaction

- Created a UIC Business Managers Group to facilitate communication, provide training, tips and tools and address issues of concern to you about OBFS and campus policies and other matters
- Introduced 4 new Grants and Contracts webinars and 2 new training sessions and had a very successful effort reporting cycle
- Redesigned a portion of the OBFS Policy & Procedures Manual to make it more of a “how to” manual and will add new sections as completed
- Developed an orientation website for new business and finance professionals which will be launched in June

Communications, Training and Customer Satisfaction (cont'd)

- Developed a Student Money Management Center and financial education website to help students manage their financial responsibilities while in school and beyond. Have also held webinars and parent open houses to ensure all incoming students and their parents know how to manage their University bill and understand their payment options

UIC Business Managers

UIC Business Managers

Information for UIC Business Managers

To find helpful information for business managers, please visit [UIC Business Managers Group](#) SharePoint intranet website.

From UIC Business Managers Group website you will be able to:

- View previous meeting presentation, upcoming meeting dates, training opportunities and important deadlines
- Update UIC Business Managers Group listing
- Post suggestions for meeting topics

Important Links:

- [Orientation for New Business and Finance Professionals](#)

OBFS – UIC Business Managers Group Webpage

The OBFS webpage is the first portal business managers will have to go through to get to the SharePoint webpage

SB 51 and Improved Purchasing Experience

- In process of creating a sole source team in Purchasing to expedite sole source requests and hearings
- Purchasing has developed training on How to Prepare a Successful Sole Source Request. Providing the correct information the first time will save time for everyone
- Developing department training on How to Create a Successful Scope of Work for a RFP or Sealed Bid. Well- developed scopes of work will reduce time to completion of bids/RFP's.
- Encouraging use of catalogs in iBuy to limit external conversations with vendors
- Reviewing internally imposed University-wide limits on delegated purchases to departments to better utilize Purchasing Department expertise

SB 51 and Improved Purchasing Experience (cont'd)



Achieving Better Financial and HR Reporting Solutions: OBFS Reporting Subcommittee Update

- In Fall 2010, rolled out the **Departmental Multi-fund Management reports package** (a set of easy-to-use departmental fund balance reports for Business/Financial Managers).
- Finalizing a portfolio of reports intended to help PI's manage financial data **for a particular grant**.
- Working on a set of reports that give various views of **ICR revenue** (by PI, by department, etc.)
- **Marketing efforts** (live demos, mass e-mail notifications, etc.) will continue as new reports are produced and posted to EDDIE.
- If you know of any reporting gaps or have **ideas for new queries/reports**, let us know!

Leverage Technology

- Testing of the new electronic travel and expense management system will begin in May with a phased rollout to all departments completed by June, 2012
- Testing of the new contract management system will begin in October with a phased rollout to departments scheduled to be completed by June, 2012. System will enable users to see current status of contracts under development and ending dates of current contracts, provide for electronic routing and approvals, provide access to contract templates and help Purchasing and OBDS plan and manage their workload

Leverage Technology (cont'd)

- Continuing the phase in of the electronic settlement process for invoicing and vendor payments with 18.5 percent of purchase order invoices settled electronically, saving both paper and \$\$'s
- Enhancing the FABWEB system to allow web-based processing of interdepartmental equipment transfers and equipment disposals (scrap and surplus)





Thank You!