UIC UNIVERSITY OF ILLINOIS AT CHICAGO

2014 BRINGING ADMINISTRATORS TOGETHER CONFERENCE

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ABOUT THE CONFERENCE

Target Audience

The target audience for this conference is UIC academic fiscal officers and school/college/department administrators with high-level research, human resources, and business and finance responsibilities.

Mission

This professional development conference will strive to provide the target audience with knowledge, resources, and networking opportunities to enable them to manage the challenges they face and to pursue excellence in their roles at the University. The conference planning team defines professional excellence as:

- being proactive through forecasting and planning versus being reactive;
- being open to different ways of doing business and developing creative solutions to business problems;
- breaking down silos and establishing connections across disciplines;
- seeing the big picture and understanding one's contribution to it;
- networking and collaborating both within one's department, as well as with other departments and units;
- actively developing one's professional career and the careers of staff members;
- having a firm understanding of the UIC environment by being aware of changes that significantly impact the University and implementing goals that support the UIC strategic plan.

Goals

The primary goals of the conference include the following:

- to facilitate the sharing of best practices, new knowledge, tips, and tools that are relevant to this target audience and that can be passed down to their staff;
- to provide a forum for this target audience to share problems and concerns and develop possible solutions for some of the most challenging issues they face;
- to encourage networking and collaboration across units, departments, and schools/colleges;
- to recognize the importance of the work being done by this group of administrators and foster a greater sense of purpose and camaraderie.

Conference Sponsors

- Lon Kaufman, Vice Chancellor for Academic Affairs and Provost
- Mitra Dutta, Vice Chancellor for Research
- Heather J. Haberaecker, Executive Assistant Vice President for Business & Finance
- Robert A. Crouch, Assistant Vice President for Human Resources

Conference Planning Team

- Mary Malcolm, OBFS, Associate Director for Training and Communications
- Joanna Sojka, OBFS, Coordinator of Business & Financial Services

REGISTRATION

Please contact the Conference Planning Team at uicadconf9@uillinois.edu with registration questions.

DIRECTIONS

The UIC Forum is located at **725 West Roosevelt Road** (on the corner of Roosevelt Road and Halsted Street). The main entrance to the building faces Halsted.

Driving Directions:

From the south: Take the Dan Ryan Expressway (I-94 W). Take Exit 52B toward Roosevelt Road/Taylor Street. Stay straight to go onto Ruble Street. Turn left onto West Roosevelt Road.

From the north: Take the Kennedy Expressway (I-90 E). Take the Taylor Street exit 52A toward Roosevelt Road. Stay straight to go onto South Union Avenue. Turn right onto Roosevelt Road.

From the east: US – 41S/Edens Expressway becomes I-94 E. Merge onto I-90 E/I-94 E. Take the Taylor Street exit 52A toward Roosevelt Road. Stay straight to go onto South Union Avenue. Turn right on Roosevelt Road.

From the west: Take the Eisenhower Expressway (I-290 E). Take the Ryan Expy/I-90 E/I-94 E exit toward Indiana. Take the Taylor Street exit 52A toward Roosevelt Road. Stay straight to go onto South Union Avenue. Turn right on Roosevelt Road.

Parking

The main parking lot for the UIC Forum is Lot 5C (located at 1135 South Morgan St. on the corner of Morgan & Roosevelt). In order to receive free relocation, you will need to present your current parking hang tag to the cashier upon exit. For those who do not have a valid UIC parking assignment, there will be a fee to park. See map for details: *https://fimweb.fim.uic.edu/CampusMaps/UICVisitorMap_E_8.5x11.pdf*

Public Transportation

The closest public transportation options are the following CTA buses (which can be taken to Blue, Green, Orange or Red 'L' lines), the Intracampus Shuttle, and the Halsted Street Metra Station:

North-South HALSTED BUS #8, Roosevelt Stop:
http://www.transitchicago.com/riding_cta/busroute.aspx?RouteId=167
- Southbound Halsted Bus #8 stops just south of the UIC Forum (Halsted & Roosevelt)
- Northbound Halsted Bus #8 stops just north of the UIC Forum (Halsted & Roosevelt)

East-West ROOSEVELT BUS #12, Halsted Stop:
http://www.transitchicago.com/riding_cta/busroute.aspx?RouteId=173
- Eastbound Roosevelt Bus #12 stops just east of Halsted, right in front of the UIC Forum
- Westbound Roosevelt Bus #12 stops just east of Halsted, across the street from the UIC Forum

Eastbound 16th-18th BUS #18, Halsted Stop:
http://www.transitchicago.com/riding_cta/busroute.aspx?RouteId=177
- Eastbound 16th-18th Bus #18 stops just east of Halsted, right in front of the UIC Forum

Intracampus Bus Service:
http://fmweb.fm.uic.edu/Trans/Intracampus_Weekday.pdf

- Stops on Halsted between Taylor and Roosevelt.

Halsted Street Metra Station (on Halsted between 15th & 16th streets):
http://metrarail.com/metra/en/home/maps_schedules/metra_system_map/bnsf/station.HALSTED.html

For more information, please visit:

UIC Campus map:
https://fimweb.fim.uic.edu/CampusMaps/UICVisitorMap_E_8.5x11.pdf

UIC Forum website:
http://www.uic.edu/depts/uicforum/directions.shtml

Chicago Transit Authority website:
http://www.transitchicago.com/

Metra
http://metrarail.com/metra/en/home.html

PROGRAM SCHEDULE

Tuesday, April 1, 2014

8:00 am – 9:00 am	Registration and Breakfast
9:00 am – 10:00 am	Provost's State of UIC and Sponsors' Update
10:00 am – 10:15 am	Break
10:15 am – 11:15 am	Workshop Breakout Session 1 • Position Authorization and Job Descriptions • Travel Expense Management (TEM) System Upgrade: Exploring the New Features and Enhancements • Overview of Web Intelligence: Preview of UI Reports Dashboard • Shared Governance Strategic Planning at UIC • Internal Controls and Fraud Prevention for Your Unit • Introducing the Clinical Trials Office: A Concierge Approach to Research Administration
11:15 am – 11:30 am	Break
11:30 am – 12:30 pm	Workshop Breakout Session 2 • Civil Service Hiring: Current State • How to Get Your RFP or Bid Out Faster • Travel Expense Management (TEM) System Reporting Tools from the EDW • The Changing Tide of Federal Regulations That Impact Research Administration • Internal Controls and Fraud Prevention for Your Unit • Determining the Appropriate Level of Reserves for Your Unit
12:30 pm – 1:30 pm	Lunch and Table Discussions
1:30 pm – 1:45 pm	Break
1:45 pm – 2:45 pm	Workshop Breakout Session 3 • Position Authorization and Job Descriptions • Travel Expense Management (TEM) System Upgrade: Exploring the New Features and Enhancements • Overview of Web Intelligence: Preview of UI Reports Dashboard • Leading Effectively in a Unionized Environment • Speeding Up the Pre-Award Process: The Do's and Don'ts of ORS Submissions • Fund Accounting 101
2:45 pm – 3:00 pm	Break
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PROGRAM SCHEDULE (Continued)

3:00 pm – 4:00 pm	Workshop Breakout Session 4 • Civil Service Hiring: Current State • Determining the Proper Purchasing Method to Use • Travel Expense Management (TEM) System Reporting Tools from the EDW • Equipment Management FUNdamentals: What Every Business Manager Needs to Know to Stay in Compliance • Project "START myResearch": Leveraging Kuali Coeus Open Source Software & PI Portal

WORKSHOP GRID

2014 Bringing Administrators Together Conference Program Grid

	Room D	Room E	Room F	Room G	Room H	Room I
Registration & Breakfast (8:00-9:00 am)						
Provost's State of UIC and Sponsors' Updates (9:00-10:00 am)						
Break (10:00-10:15 am)						
Session 1 **10:15-11:15 am** **(60 minutes)**	Position Authorization and Job Descriptions (HR)	Travel Expense Management (TEM) System Upgrade: Exploring the New Features and Enhancements (OBFS)	Overview of Web Intelligence: Preview of UI Reports Dashboard (AITS DS)	Shared Governance Strategic Planning at UIC (VCAA)	Internal Controls and Fraud Prevention for Your Unit (UA IA)	Introducing the Clinical Trials Office: A Concierge Approach to Research Administration (OVCR)
Break (11:15-11:30 am)						
Session 2 **11:30 am-12:30 pm** **(60 minutes)**	Civil Service Hiring: Current State (HR)	How To Get Your RFP or Bid Out Faster (OBFS)	Travel Expense Management (TEM) System Reporting Tools from the EDW (AITS DS)	The Changing Tide of Federal Regulations That Impact Research Administration (OBFS & OVCR)	Internal Controls and Fraud Prevention for Your Unit (UA IA)	Determining the Appropriate Level of Reserves for Your Unit (VCAA)
Lunch and Table Discussions (12:30 pm-1:30 pm)						
Break (1:30-1:45 pm)						
Session 3 **1:45-2:45 pm** **(60 minutes)**	Position Authorization and Job Descriptions (HR)	Travel Expense Management (TEM) System Upgrade: Exploring the New Features and Enhancements (OBFS)	Overview of Web Intelligence: Preview of UI Reports Dashboard (AITS DS)	Leading Effectively in a Unionized Environment (HR)	Speeding Up the Pre-Award Process: The Do's and Don'ts of ORS Submissions (OVCR)	Fund Accounting 101 (OBFS)
Break (2:45-3:00 pm)						
Session 4 **3:00-4:00 pm** **(60 minutes)**	Civil Service Hiring: Current State (HR)	Determining the Proper Purchasing Method to Use (OBFS & Campus Participants)	Travel Expense Management (TEM) System Reporting Tools from the EDW (AITS DS)	Equipment Management FUNdamentals: What Every Business Manager Needs to Know to Stay in Compliance (OBFS)	Project "START myResearch: "Leveraging Kuali Coeus Open Source Software & PI Portal (OVCR)	

WORKSHOP DESCRIPTIONS

Workshop Breakout Session 1: 10:15 am – 11:15 am

POSITION AUTHORIZATION AND JOB DESCRIPTIONS

Presented By:
- Ron Puskarits, Director of Compensation, Human Resources
- Debbie Lewis, Compensation Consultant, Human Resources

Description: The process of obtaining approval to fill a position has many components that the initiator must follow. The purpose and focus of this workshop is to discuss the information needed to begin the process and how to successfully complete the Position Authorization Form in HireTouch. We will discuss the fields that cause the most confusion and how to correctly navigate them. We will also discuss job descriptions and their role in the position approval process.

Learning Objectives:
- Define information needed to complete the Position Authorization form.
- Review the role of job descriptions in the position approval process.

TRAVEL EXPENSE MANAGEMENT (TEM) SYSTEM UPGRADE: EXPLORING THE NEW FEATURES AND ENHANCEMENTS

Presented By: Darren Strater, Associate Director, OBFS University Payables

Description: This workshop will provide information on the new functionality of the upgraded Travel Expense Management (TEM) system. The workshop will include an overview of the new interface, how to attach receipts, how to recall a submitted expense report and how to avoid accidentally paying yourself.

Learning Objective: Identify the new features of the TEM system.

Workshop Breakout Session 1: 10:15 am – 11:15 am (continued)

OVERVIEW OF WEB INTELLIGENCE: PREVIEW OF UI REPORTS DASHBOARD

Presented By:	• Mandy Bodine, Assistant Director, AITS Decision Support • Colleen Miller, Business Intelligence Services Coordinator, AITS Decision Support
Description:	With the upgrade of Business Objects in the near future, reporting will transition from Desktop Intelligence to Web Intelligence. Come and learn about the AITS Decision Support upgrade project to receive tips on creating reports using Web Intelligence.
Learning Objective:	Discuss the upcoming method of creating reports using Web Intelligence.

SHARED GOVERNANCE STRATEGIC PLANNING AT UIC

Presented By:	Saul Weiner, Vice Provost for Planning and Programs, VCAA
Description:	This workshop will describe the relationship between campus and unit level planning in an RCM budget allocation model.
Learning Objectives:	• Recognize the various planning projects that have implications for the unit. • Propose next steps for strategic planning in the unit.

INTERNAL CONTROLS AND FRAUD PREVENTION FOR YOUR UNIT

Presented By:	Neal Crowley, Director of UIC University Audits
Description:	This workshop will provide an overview of the design and implementation of internal controls in University business processes with emphasis on the consideration of fraud. We will use a case study to discuss fraud indicators, traits and characteristics of fraud perpetrators, and the internal control breakdowns that conceal fraud. We will cover the various internal control procedures that management can introduce into the business process to mitigate the occurrence of fraud.
Learning Objectives:	• Describe the strengths and weaknesses of various internal control types. • Identify emerging internal control issues from most recent internal audits. • Recognize common fraud indicators.

INTRODUCING THE CLINICAL TRIALS OFFICE: A CONCIERGE APPROACH TO RESEARCH ADMINISTRATION

Presented By:	Lisa R. Pitler, Assistant Vice Chancellor, OVCR
Description:	This workshop will provide an introduction to the Clinical Trials Office (CTO), its function, and role and services it will provide in the administrative support of the conduct of clinical trials. We will discuss the relationship and workflow with the Office of Research Services (Contracts) and the Office for the Protection of Research Subjects (IRB). The workshop will address the harmonized review of the research-related documents incorporating the Medicare rules and regulations pertaining to drug and device clinical trials. It will also introduce the coverage analysis, which is a methodology to work with Medicare's Clinical Trial Policy and the device regulations.

Learning Objectives:

- Describe the function and role of the Clinical Trials Office.
- Discuss the interrelationship between the Clinical Trials Office, the Office of Research Services (Contracts) and the Office for the Protection of Research Subjects (IRB).
- Compare and contrast the differences between the Medicare Clinical Trial Policy and the device regulations.
- Identify the purpose of the coverage analysis.

Workshop Breakout Session 2: 11:30 – 12:30 pm

CIVIL SERVICE HIRING: CURRENT STATE	

Presented By: Joanne Tolbert-Wells, Director of Recruitment and Staffing, Human Resources

Description: This workshop will provide an overview of changes to be made to the civil service hiring process. Participants will receive information about the new customer service standards and partnership expectations regarding civil service hiring.

Learning Objective: Identify the changes in civil service hiring including new standards and expectations.

HOW TO GET YOUR RFP OR BID OUT FASTER	

Presented By:
- Heather Haberaecker, Executive Assistant Vice President for Business and Finance/Chief Business Officer, OBFS
- Kevin Fair, Interim Director of OBFS Purchasing
- Arlene Shorter, Senior Contract Coordinator, OBFS Purchasing

Description: This workshop will detail the proposed process for completing an effective scope of work for a RFP (Request For Proposal) or bid process. There will be a discussion about the pitfalls to avoid in developing the scope of work and what you can expect in return from Purchasing if the scope is done well. The workshop also will review the proposed means of measuring Purchasing time to completion of the bid process and what we need from you in the bid evaluation process.

Learning Objectives:
- Review the proposed method of preparing an effective Scope of Services.
- Explain what you can expect from OBFS Purchasing.

TRAVEL EXPENSE MANAGEMENT (TEM) SYSTEM REPORTING TOOLS FROM THE EDW

Presented By:
- Mandy Bodine, Assistant Director, AITS Decision Support
- Jerry Myers, Functional Area Coordinator, AITS Decision Support

Description: This workshop will provide details and tips on the Electronic Data Warehouse (EDW) Business Objects universe Finance Travel and Expense. This universe allows you to report on unattached T-Card transactions, identify how long expense reports take at each stage of the process and identify if employees have set up a proxy in the TEM system. Come to learn how the universe can assist your department in accessing the data from TEM.

Learning Objective: Access data from the TEM system to prepare departmental reports.

THE CHANGING TIDE OF FEDERAL REGULATIONS THAT IMPACT RESEARCH ADMINISTRATION

Presented By:
- Vanessa Peoples, Executive Director and Assistant Chief Business Officer, OBFS Grants and Contracts
- Karen McCormack, Senior Associate Director, OBFS Grants and Contracts
- Mee Mee Lee-Choi, Associate Director, OBFS Grants and Contracts
- Patricia Pfister, JD, CRA, Associate Director, Sponsored Projects (Research Contracts), OVCR Office of Research Services

Description: You may be familiar with the existing federal circulars that are used to administer your sponsored awards such as A-21 for Cost Principles and A-110 for administrative guidelines. All of the circulars have undergone a major overhaul. We would like to share some of the overarching changes with campus administrators but more importantly, we would like your input on potential process and policy changes you think may need to be considered as a result of the changing regulations. We also would like to discuss changes to the sponsored award close-out process in relation to the HHS transition to a subaccount payment method.

Learning Objectives:
- Receive an overview of the overarching changes.
- Evaluate potential changes in policies and procedures that may impact your department or college.
- Relate input to central office staff that will help facilitate seamless adoption of the new regulations.

INTERNAL CONTROLS AND FRAUD PREVENTION FOR YOUR UNIT

Presented By: Neal Crowley, Director of UIC University Audits

Description: This workshop will provide an overview of the design and implementation of internal controls in University business processes with emphasis on the consideration of fraud. We will use a case study to discuss fraud indicators, traits and characteristics of fraud perpetrators, and the internal control breakdowns that conceal fraud. We will cover the various internal control procedures that management can introduce into the business process to mitigate the occurrence of fraud.

Learning Objectives:
- Describe the strengths and weaknesses of various internal control types.
- Identify emerging internal control issues from most recent internal audits.
- Recognize common fraud indicators.

DETERMINING THE APPROPRIATE LEVEL OF RESERVES FOR YOUR UNIT

Presented By: Janet Parker, Associate Chancellor and Vice Provost for Budget and Resource Planning

Description: This workshop will have discussion on what is necessary to establish a financial reserves policy at UIC. Presentation topics will include defining financial reserves and types of reserves, discussing the approach for determining the appropriate level of reserves, and budgeting reserves.

Learning Objective: Define University best practices toward creating a reserve policy.

Lunch and Table Discussions

Be sure to register to share lunch and discussions with other business and finance colleagues. You can discuss ideas, best practices and solutions to problems. There will be a facilitator for each topic but discussions will be driven primarily by your comments and questions.

The discussion topics are listed below. When you arrive for the conference, you will be given a name tag that will list your workshops and either your first choice or second choice lunch table discussion topic.

Discussion Topic	Facilitator Unit(s)
Best Practices in Cash Handling	**OBFS University Student Financial Services & Cashier Operations**
Best Practices in Subrecipient Monitoring	**OBFS Grants and Contracts**
Budget Planning	**VCAA Budgeting & Program Analysis and OBFS Budget Operations and Financial Analysis**
Consult with the Accounting Consulting Group	**OBFS University Accounting & Financial Reporting**
Discussion: The Changing Tide of Federal Regulations That Impact Research Administration	**OBFS Grants and Contracts and OVCR ORS**
Equipment Management Myth Busters	**OBFS University Accounting & Financial Reporting**
Help With Managing Your Accounts Receivable	**OBFS University Student Financial Services & Cashier Operations**
How to Prevent Fraud	**UA Internal Audit**
How to Request Lease Space On or Off Campus	**OBFS Real Estate Services**
iCS Tips and Tools	**OBFS Business Development Services and Purchasing**
Institutional Review Board (IRB) Process	**OVCR Office for Protection of Research Subjects**
Interviewing Skills and Techniques	**HR Organizational Effectiveness**
Leadership Skills and Crucial Conversations to Manage College/Unit Operations	**HR Organizational Effectiveness**
Maintaining Work-Life Balance	**Laura Knights**

Discussion Topic	Facilitator Unit(s)
New Business Manager Resources	OBFS Administrative Services
New Hires, Visa Status and the Insurance Market Place	OBFS University Payroll and Benefits
Payment Methods – Purchase Orders & Others	OBFS University Payables
Persuasion: Strategies for Enhancing Your Influence	Vanessa Peoples
Reporting Best Practices	AITS Decision Support
Research Conflicts of Interest	OVCR Office of Conflict of Interest
Research Services and Contract Negotiations	OVCR Office of Research Services
Successfully Managing Self-Supporting Funds	OBFS University Accounting & Financial Reporting
TEM, Travel and T-Card	OBFS University Payables
Topics in Facilities Management	VCAS Facilities Management
Update on SURS and Pension Reform	HR Shared Services
Using Available Data to Support Business Practices	VCAA Office of Institutional Research
Where to Find Information on the OBFS Website	OBFS Administrative Services

WORKSHOP DESCRIPTIONS

Workshop Breakout Session 3: 1:45 pm – 2:45 pm

POSITION AUTHORIZATION AND JOB DESCRIPTIONS

Presented By:
- Ron Puskarits, Director of Compensation, Human Resources
- Debbie Lewis, Compensation Consultant, Human Resources

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TRAVEL EXPENSE MANAGEMENT (TEM) SYSTEM UPGRADE: EXPLORING THE NEW FEATURES AND ENHANCEMENTS

Presented By: Darren Strater, Associate Director, OBFS University Payables

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Learning Objective: Identify the new features of the TEM system.

OVERVIEW OF WEB INTELLIGENCE: PREVIEW OF UI REPORTS DASHBOARD

Presented By:
- Mandy Bodine, Assistant Director, AITS Decision Support
- Colleen Miller, Business Intelligence Services Coordinator, AITS Decision Support

Description: With the upgrade of Business Objects in the near future, reporting will transition from Desktop Intelligence to Web Intelligence. Come and learn about the AITS Decision Support upgrade project to receive tips on creating reports using Web Intelligence.

Learning Objective: Discuss the upcoming method of creating reports using Web Intelligence.

Workshop Breakout Session 3: 1:45 pm – 2:45 pm (continued)

LEADING EFFECTIVELY IN A UNIONIZED ENVIRONMENT

Presented By:
- Thomas Riley, Director of Labor and Employee Relations, Human Resources
- Lisa Caridine, Labor/Employee Relations Officer, Human Resources

Description: The complexities and challenges of leading and managing in a unionized work environment will be explored during the workshop.

Learning Objectives:
- Review operational objectives.
- Build effective relationships within a unionized environment.

SPEEDING UP THE PRE-AWARD PROCESS: THE DO'S AND DON'TS OF ORS SUBMISSIONS

Presented By:
- Carla Dodd, Sponsored Project Specialist, OVCR Office of Research Services
- Megan Konley, Research Information Coordinator, OVCR Office of Research Services
- Christopher Zack, Sponsored Projects Specialist, OVCR Office of Research Services

Description: Business managers are responsible for the day-to-day administration of sponsored projects. This includes preparing proposals and oversight of all applicable Federal, State and University rules and regulations. The Office of Research Services (ORS) assists the campus in preparing and submitting funding proposals and supporting information for sponsored projects, and is responsible for enforcement of related rules and regulations. To make the process easier for all involved, this workshop will focus on the key obstacles involved in pre-award proposal activities: proposal development, budgeting, submission, and institutional compliance related activities.

Learning Objectives:
- Review the types of proposals: new, continuation, supplement and revisions.
- Define the various components of a proposal budget and how to apply the institution's F&A cost rate.
- Receive an overview and updates of internal and external policies and procedures.
- Explain why compliance-related issues matter at proposal stage and what are your responsibilities.
- Name tips for avoiding delays and common errors.

FUND ACCOUNTING 101

Presented By:	• Nick Deitch, Assistant Director, OBFS University Accounting and Financial Reporting
	• Tim Parrish, Financial Accounting & Reporting Analyst, OBFS University Accounting and Financial Reporting
Description:	Let's discuss Fund Accounting at the University of Illinois! What are state funds, institutional funds, self-supporting funds, and gift funds? What are the best practices for these funds? Join University Accounting & Financial Reporting as we provide an overview of these funds, limitations on use, along with common mistakes and ways to avoid them.
Learning Objectives:	• Identify the basics of Fund Accounting.
	• Review best practices for state, institutional, self-supporting, and gift funds.
	• Examine methods to avoid common mistakes.

Workshop Breakout Session 4: 3:00 pm – 4:00 pm

CIVIL SERVICE HIRING: CURRENT STATE

Presented By: Joanne Tolbert-Wells, Director of Recruitment and Staffing, Human Resources

Description: This workshop will provide an overview of changes to be made to the civil service hiring process. Participants will receive information about the new customer service standards and partnership expectations regarding civil service hiring.

Learning Objective: Identify the changes in civil service hiring including new standards and expectations.

DETERMINING THE PROPER PURCHASING METHOD TO USE

Presented By:
- Kevin Fair, Interim Director of OBFS Purchasing
- Julia Kilgore, iBuy Trainer, OBFS Purchasing
- Ruth Rios, Senior Contract Coordinator, OBFS Purchasing
- Kandra Miller, Assistant Director, OBFS University Payables
- Panel of Business Managers

Description: This workshop will review the best methods for purchasing various items, including when to use the P-Card versus a requisition or iBuy catalog. You will hear how several Business Managers make these decisions. We will cover purchasing methods for generally small and non-formal bid purchases. (Formal bid level purchasing needs are addressed in session 2's **How To Get Your RFP or Bid Out Faster** workshop.) Types of purchases will include the following:
--Small purchase limits
--Requisitions
--iBuy catalog
--P-Card and T-Card
--P&A under $5,000
--P&A over $5,000-$19,999
--Sole Source purchases
--Exempt purchases
--Joint and Cooperative purchasing
--Contracts Search Tool

Learning Objective: Identify the proper procurement method to be used when purchasing your unit's goods and services.

TRAVEL EXPENSE MANAGEMENT (TEM) SYSTEM REPORTING TOOLS FROM THE EDW

Presented By:
- Mandy Bodine, Assistant Director, AITS Decision Support
- Jerry Myers, Functional Area Coordinator, AITS Decision Support

Description: This workshop will provide details and tips on the Electronic Data Warehouse (EDW) Business Objects universe Finance Travel and Expense. This universe allows you to report on unattached T-Card transactions, identify how long expense reports take at each stage of the process and identify if employees have set up a proxy in the TEM system. Come to learn how the universe can assist your department in accessing the data from TEM.

Learning Objective: Access data from the TEM system to prepare departmental reports.

EQUIPMENT MANAGEMENT FUNDAMENTALS: WHAT EVERY BUSINESS MANAGER NEEDS TO KNOW TO STAY IN COMPLIANCE

Presented By: Jeff Weaver, Senior Associate Director, University Accounting and Financial Reporting

Description: This workshop will provide an overview of State and Federal regulations and compliance issues along with related University Equipment Management policies and procedures. You will receive tips and tools to better manage equipment inventory, avoid common problems, and prevent and detect errors and fraud.

Learning Objectives:
- Review the equipment management responsibilities of the Business Manager.
- Identify key regulations and policies related to Equipment Management.
- Examine helpful tips and tools for Inventory Management that can be applied to your department's processes.

PROJECT "START myRESEARCH": LEVERAGING KUALI COEUS OPEN SOURCE SOFTWARE & PI PORTAL

Presented By:	• Youngwook Song, Associate Director, Administrative Information Technology Services • Jan Novakofski, Associate Vice Chancellor for Research for Compliance, UIUC • Jennifer Rowan, Executive Director, Research Administration and Operations, OVCR • Jacqueline Berger, Director of Communications and Interim Executive Director, Information Technology, OVCR
Description:	**START** (Systemwide Tools for Administration of Research and Training) is the implementation of Kuali Coeus (KC) open source software for grants management and **myResearch** is the Principal Investigator (PI) portal that will integrate and display information from a number of different university systems, giving faculty access to the information they need to prepare, submit, route, and manage their grants. This is a multi-year project with five major research support areas – Conflict of Interest (COI), Principal Investigator (PI) Portal, Pre-award, Institutional Review Board (IRB), and Institutional Animal Care and Review Committee (IACUC). The goal is to minimize the administrative burdens of managing faculty research in order to increase productivity and the value of the University's portfolio.
Learning Objectives:	• Review the overall objective, scope, and roadmap of the START myResearch project. • Discuss how START myResearch may impact you and/or your clients in terms of research support.

Workshop and Conference Evaluations

Please take a few minutes after each workshop to complete the workshop evaluation. This will give the workshop presenters feedback on what was valuable to you and will identify opportunities for improvement.

During the week after the conference, you will receive an e-mail with a link to the conference evaluation. Again, we encourage you to complete the evaluation to let us know if the conference program met your needs and fulfilled your expectations. Your comments and suggestions are very valuable to us, and we appreciate receiving your opinions.