

**AUGUST
2009**

Bu\$ine\$\$ Matter\$

The monthly newsletter of Ohio University Finance

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Prior Stories!!!

Do you need to refer to a story from July? June? May? Please access the link below. Click on the applicable month.

<http://www.ohio.edu/finance/gafr/businessmatters.cfm>

The **JULY 2009** Financial Management System (FMS) reports are now available to those of you who are report recipients at:

https://epprod.cats.ohiou.edu:8900/OA_HTML/CustomEPRDLogin.html.

Be sure to read below for important information related to your reports and other Finance services.

If you need assistance accessing your reports or FMS in general, please contact the IT Service Desk at: 593-1222 or servicedesk@ohio.edu.

If you have further questions or comments, please contact Tanya Hire at: 7-1417 or biblert@ohio.edu.

New Stories!

Payroll Forms Update for all Departments

The Payroll Department would like to inform all departments that the forms to be completed when hiring students have been updated. Please visit the Payroll website to update your forms. The link is:

www.ohio.edu/finance/payroll

You will then need to click on the Student Payroll Hire Info link.

Purchasing Grid Update

An updated Purchasing Grid is now available on the Finance Forms website. Please check the Purchasing Grid regularly as updates will be made periodically based upon current Ohio University Policies. The Purchasing Grid may be viewed at:

<http://www.ohio.edu/finance/forms/financeforms.cfm> and click on Purchasing Grid.

A new name for Shared Services

Department changes name to University Business Services

From staff reports

The Department of Shared Services at Ohio University has been renamed University Business Services.

Mark Hopton, assistant vice president for University Business Services, said that the name change reflects the university-wide scope of the department's mission and that he hopes to alleviate confusion between the functions of the office itself and the overall concept of shared services.

"UBS' focus is on consolidating business functions, standardizing processes and delivering efficiencies through business process re-engineering," Hopton said. "This change reflects a university-wide focus on business processes, emphasizing the university's commitment to modify our current business practices.

"This should also allow our internal and external stakeholders to better understand the partnership that exists among all planning units, as UBS strengthens its support to the university."

The shared services model is [one of several initiatives](#) designed to support [Vision OHIO](#) including strategic procurement, pay and classification planning, academic support unit program review, strategic enrollment management and sustainability planning. Officials are also looking at utilizing shared services to improve efficiencies in information technology and communications and marketing.

University Business Services will provide the support services and guidance necessary to implement a shared services model as an integral part of the Ohio University culture. University Business Services manages the following departments: Procurement, Accounts Payable, Payroll, Travel, Expense Reimbursement and the Business Service Center.

Hopton stressed, however, that the name change does not reflect a fundamental change in the day-to-day operations of the unit.

Projects on the horizon for University Business Services include expanding the role of e-business at the university by automating certain business processes, developing enhanced invoice routing and approval in Accounts Payable and expanding the functionality of Oracle in order to reduce the operating costs associated with updating employee information, printing pay stubs and verifying employment.

University Business Services is located at 168 HDL Center on West Union St. and can be reached at 740-597-3165.

From Ohio University Outlook, July 29, 2009.

<http://www.ohio.edu/outlook/08-09/July/759.cfm>

New printing procurement policy adopted

Policy designed to keep business on campus, officials say

Aug 4, 2009

By Megan Greve and George Mauzy

Ohio University recently adopted a new policy that requires all printing and high-volume duplication jobs to be submitted to University Printing Services, located in Building 37 in The Ridges, as a way to increase efficiency and save money.

The policy, no. 55.035, establishes guidelines in the purchasing of printing services, facilitates consistency in the design of printed pieces, ensures university compliance with state laws and takes advantage of the

full capacity of services that [University Printing Services](#) offers its clients, according to Associate Vice President for Finance and Administration Terry Conry.

To reach University Printing Services call 740-593-1930.

The full story can be accessed in the Ohio University Outlook at the following link:

From Ohio University Outlook, August 4, 2009.

<http://www.ohio.edu/outlook/08-09/August/764.cfm>

Equipment Inventory

The June 30, 2009, quarterly Equipment Inventory report will be sent out in August via electronic mail. Although no response is needed for this emailing it is still important the department reviews the inventory listing for changes.

The auditors for Ohio University, Plante and Moran, will be on campus beginning August 17. They will be conducting an inventory audit this year and will randomly select equipment for auditing and the equipment needs to be in the location indicated on the June 30, report.

Location & name changes can be noted on the inventory list and returned to the Equipment Inventory office. Items to be removed from the inventory list should be submitted on an EI-8 form located on the Equipment Inventory website <http://www.ohio.edu/finance/equipmentinventory/EIFORMS.cfm>
If you have any questions contact Michelle Schall 593-1904 or schall@ohio.edu.

Monthly Reminders!

P-CARD: P-Card transactions are now in the Concur Travel and Expense system. Transactions will be reflected in your FMS reports as your P-Card and Travel expense reports are submitted, approved, and processed by central Finance and Shared Services. Anything processed by the end of the day on the 2nd to last business day of the month will post to that month's FMS reports. Questions regarding this process can be directed to Tanya Hire at: biblert@ohio.edu.

WEB UPDATES: An updated version of the New Account/Account Maintenance form is now available on the Finance web site under Forms and Manuals. Please use the updated version for future accounts and maintenance. You may access the Finance web site at the following location:

<http://www.ohio.edu/finance/forms/financeforms.cfm>.

FINANCE ONLINE TRAINING: Visit our Finance Training web site.

You will find Finance Online Training demos, Practice Your Skills and handouts. The training topics include P-Card/Paris, Travel, Financial Management System (FMS), and WorkForce. The Finance Training web site contains information on accessing and using Oracle FMS and Paris, applying for a purchasing card, reviewing travel policies and forms, Purchase Order Lookup, Invoice Payments, approving Work Force timesheets and

more. We are currently working on additional training demos covering other Finance topics which will be available soon. You may access the Finance Training web site at the following location:

<http://www.ohio.edu/finance/training/index.cfm>

REPORT DISTRIBUTION MAINTENANCE: When employees change jobs or leave the university, please ask your planning unit's Budget Unit Manager to contact Rita Kapp at: kapp@ohio.edu and copy Cindy Smith at: smithc16@ohio.edu to update FMS report distribution maintenance.

ACCESS TO FMS: Please contact Tanya Hire at: biblert@ohio.edu and copy Cindy Smith at: smithc16@ohio.edu to request online access to FMS. This request must come from the department head. Departments are responsible for making sure the employee completes the online training modules PRIOR to accessing the system.

TRANSACTION DEADLINES: Data Entry is no longer accepting accounting corrections for transactions posted in FMS in FY09.

All Accounting Corrections for transactions posted in FMS through **July 31, 2009** are due in Finance by **October 1, 2009**.

All invoices for payment, internal billings, external billings, etc. dated through **July 31, 2009**, are due in Finance by **September 1, 2009**.

PREVIOUS ISSUES OF BUSINESS MATTERS: Previous issues of Business Matters can be found at:

<http://www.ohio.edu/finance/gafr/businessmatters.cfm>.