

**Business Administrator
Services (BAS) Forum
June 2021**




KENT STATE
UNIVERSITY

FlashCart User Interface Changes

Presented by

Larry McWilliams, Strategic Sourcing Manager

Melissa Ricchiuti, Sourcing Analyst/Procurement Agent

Procurement Department

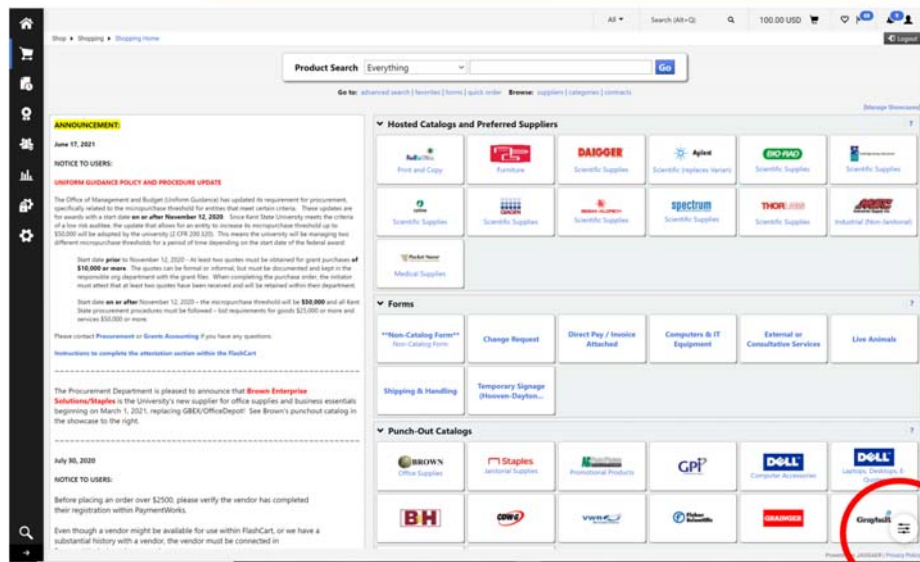


FlashCart User Interface Changes

- General changes in appearance, no changes in functionality
- More modern, streamlined and simplified
- System-wide changes to take effect on **July 23**
- Starting June 25, users may opt to preview the changes, but are not required

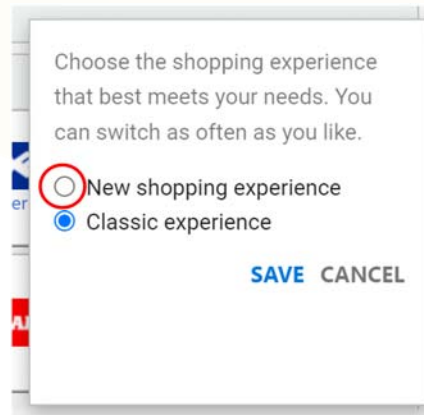
FlashCart User Interface Changes

- On June 25, a toggle button will appear in the bottom-right corner of users' sites which will allow the user to preview the changes:



FlashCart User Interface Changes

- Clicking on the toggle button will pull up the following dialogue box, allowing you to opt into previewing the new look and experiencing the changes:



- Select “new shopping experience” by clicking on the appropriate radio button in the dialogue box, and click “SAVE”.

FlashCart User Interface Changes

- Changes include an updated Home Page appearance...

The screenshot displays the FlashCart user interface. At the top, there is a navigation bar with a search bar, currency (100.00 USD), and user profile icons. Below the navigation bar, the main content area is divided into several sections:

- ANNOUNCEMENT:** A section titled "NOTICE TO USERS: UNIFORM GUIDANCE POLICY AND PROCEDURE UPDATE" dated June 17, 2021. It contains text about procurement policy changes and a link to "Instructions to complete the situation section within the FlashCart".
- Hosted Catalogs and Preferred Suppliers:** A grid of logos for various suppliers, including Audiotex, DAINGER, Agilent, BIO-RAD, Scientific Supplies, and others.
- Forms:** A section with links to "Non-Catalog Form", "Change Request", "Direct Pay / Invoice Attached", "Computers & IT Equipment", "External or Consultative Services", and "Live Animals".
- Punch-Out Catalogs:** A grid of logos for suppliers like BROWN, Staples, GPI, DELL, BH, COWI, VORTEX, and others.

The interface is clean and organized, with a clear navigation path and easy access to various services and announcements.

FlashCart User Interface Changes

- ...streamlined carts...

Requisition : 145132460

Summary | Taxes/SAH | PO Preview | Comments | Attachments | History

General

Cart Name: 2021-06-11 lmcwill01

Description: no value

Priority: Normal

Prepared by: Lawrence McWilliams

Prepared for: Lawrence McWilliams

Buyer: no value

Shipping

Ship To:

Contact Name: Larry McWilliams / Rm 330
Phone: +1 (330) 672-9196
Email: lmcwill@kent.edu
KENT STATE TUSCARAWAS
PERFORMING ARTS CENTER
360 UNIVERSITY DR NE
NEW PHILADELPHIA, OH 44663
United States

Delivery Options

Expedite: ✗

Ship Via: Best Carrier Best Way

Requested Delivery Date: no value

Billing

Bill To:

Contact Name: Larry McWilliams
Phone: +1 (330) 672-9196
KSU ACCOUNTS PAYABLE
237 SCHWARTZ CENTER
KENT, OH 44242
United States

Credit Card Info

No credit card has been assigned.

Billing Options

Accounting Date: no value

Accounting Codes

Chart	Index	Fund	Organization	Account	Program
K	101294	110118	100648	no value	6100
Kent State University	Assessment & Planning	Fid Stalkant Test	Assessment & Planning	✗ Required	Institutional Support

Internal Notes and Attachments

Internal Note: no value

Internal Attachments: [Add](#)

FAMIS: no value

External Notes and Attachments

Note to all Suppliers: no value

Attachments for all suppliers: [Add](#)

100 Items

Fisher Scientific Co LLC - 100 Items - 100.00 USD

SUPPLIER DETAILS Vendor Purchase Order 2: 300 Industry Dr, Pittsburgh, Pennsylvania 15275-1001 United States

Contract: 19-472a LWM PO Number: To Be Assigned

Correct these issues.
You are unable to proceed until addressed.

[Required Account](#)

[Required Commodity Code \(Line 1\)](#)

Total (100.00 USD)

Subtotal	100.00
Shipping	0.00
Handling	0.00
Total	100.00

[Place Order](#)

[Assign Cart](#)

What's next for my order?

Next Step: Org Approval

Approver: Williams, Sonya

Workflow

☐ Show skipped steps

- Draft**
Active
Lawrence McWilliams
- Banner Budget Authorization**
Future
- Org Approval**
Future
- Purchasing**
Future
- Create PO**
Future
- Finish**
Future

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FlashCart User Interface Changes

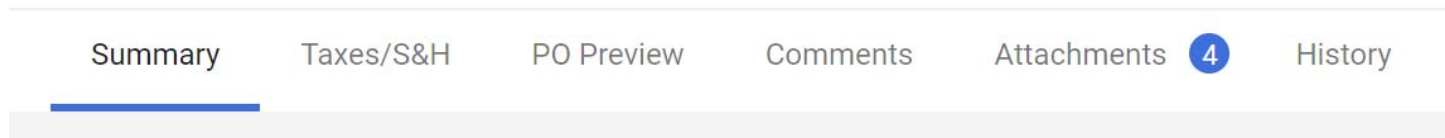
- ...moving search and browse functionalities to the top of the screens...



The image shows a search bar interface with two tabs: 'Simple' (selected) and 'Advanced'. To the right of the tabs are links: 'Go to: Favorites | Forms | Quick Order' and 'Browse: Suppliers | Categories | Contracts'. Below the tabs is a search input field with the placeholder text 'Search for products, suppliers, forms, part number, etc.' and a blue search button with a magnifying glass icon.

- ...cart navigation functionalities to the top of the screen...

Requisition ▼ : 145470415



The image shows a navigation bar for a requisition. It has six tabs: 'Summary' (selected), 'Taxes/S&H', 'PO Preview', 'Comments', 'Attachments' (with a blue circle containing the number 4), and 'History'.

FlashCart User Interface Changes

- ...and requisition workflow statuses to the sides:

The screenshot displays a requisition workflow in the FlashCart system. At the top, a blue header indicates the status is "Pending". Below this, a summary table shows the financial details: Total (3,850.52 USD), Subtotal (3,850.52), Shipping (0.00), and Handling (0.00), with a final total of 3,850.52. A blue button labeled "Assign To Myself" is positioned below the summary. The main section, titled "What's next?", shows a vertical workflow timeline. A toggle switch for "Show skipped steps" is at the top of the timeline. The steps are: Submitted (6/22/2021 8:21 AM, Penny Englehart), Banner Budget Authorization (Completed, System), Org Approval (Approved, Ronald Bammerlin), Account Approval (Approved, Michael Farina), Purchasing (Active, highlighted with a blue circle and arrow), Create PO (Future), and Finish (Future). Each step has a downward arrow icon to its left and a three-dot menu icon to its right.

Pending	
Total (3,850.52 USD)	
Subtotal	3,850.52
Shipping	0.00
Handling	0.00
	3,850.52

Assign To Myself

What's next?

Workflow

☐ Show skipped steps

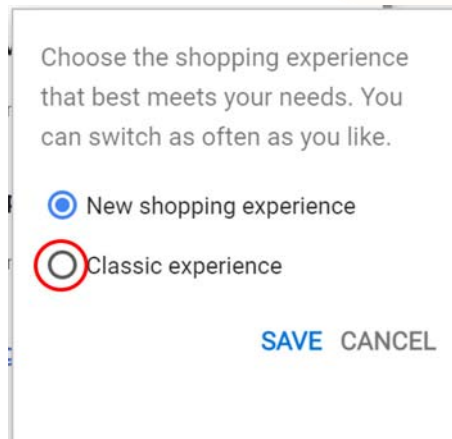
- Submitted
6/22/2021 8:21 AM
Penny Englehart
- Banner Budget Authorization
Completed
System
- Org Approval
Approved
Ronald Bammerlin
- Account Approval
Approved
Michael Farina
- Purchasing
Active
- Create PO
Future
- Finish
Future

FlashCart User Interface Changes

- To revert back to the still-current version and appearance of FlashCart, click on the toggle button again...



- Select “classic experience” by clicking on the appropriate radio button in the dialogue box, and click “SAVE”.



FlashCart User Interface Changes

- While preview is going on, Procurement will enlist the help of several key FlashCart users for more in-depth review and practice of changes
- Input from these users will help with updated training materials
- Updated training materials will be available mid-July on the Procurement website to coincide with go-live of interface changes on July 23
- All end-users are encouraged to preview changes and provide feedback and questions to procurement@kent.edu

Questions?

Next Up

(leave blank, Stina will fill in this section)



Accounts Payable: Fiscal Year End and General Reminders

Presented by Emily Hermon



Old Year or New Year?

Expenditures must be recorded in the fiscal year during which they occur.

- FY21 = goods received, and services rendered on or before June 30
- FY22 = goods received, and services rendered on or after July 1

This holds true regardless of the status of your budget at fiscal year end.

Accounts Payable Year-End Deadlines



These deadlines ensure that AP can process payments and record expenses in a timely manner that allows the university's accountants to perform their fiscal year end closing.

Accounts Payable Year-End Deadlines

Fully documented and approved payment requests must be emailed to apinvoices@kent.edu:

- FY21 wire transfer requests – by 5 p.m. on Friday, June 25
- FY21 PO invoices and payment request forms – by 5 p.m. on Tuesday, July 6

Earlier is better!

Accounts Payable Year-End Deadlines

Submit and obtain final departmental/divisional approval for the following electronic transactions:

- FY21 expense reimbursements – by 5 p.m. on Friday, June 25
NOTE: Grants Accounting will approve by Tuesday, June 29
- Pcard transactions posted through June 30 – by 5 p.m. on Tuesday, July 6
NOTE: Cardholders must submit a pcard maintenance form if they, their proxy reconcilers, or their approvers are leaving the university.

Earlier is better!

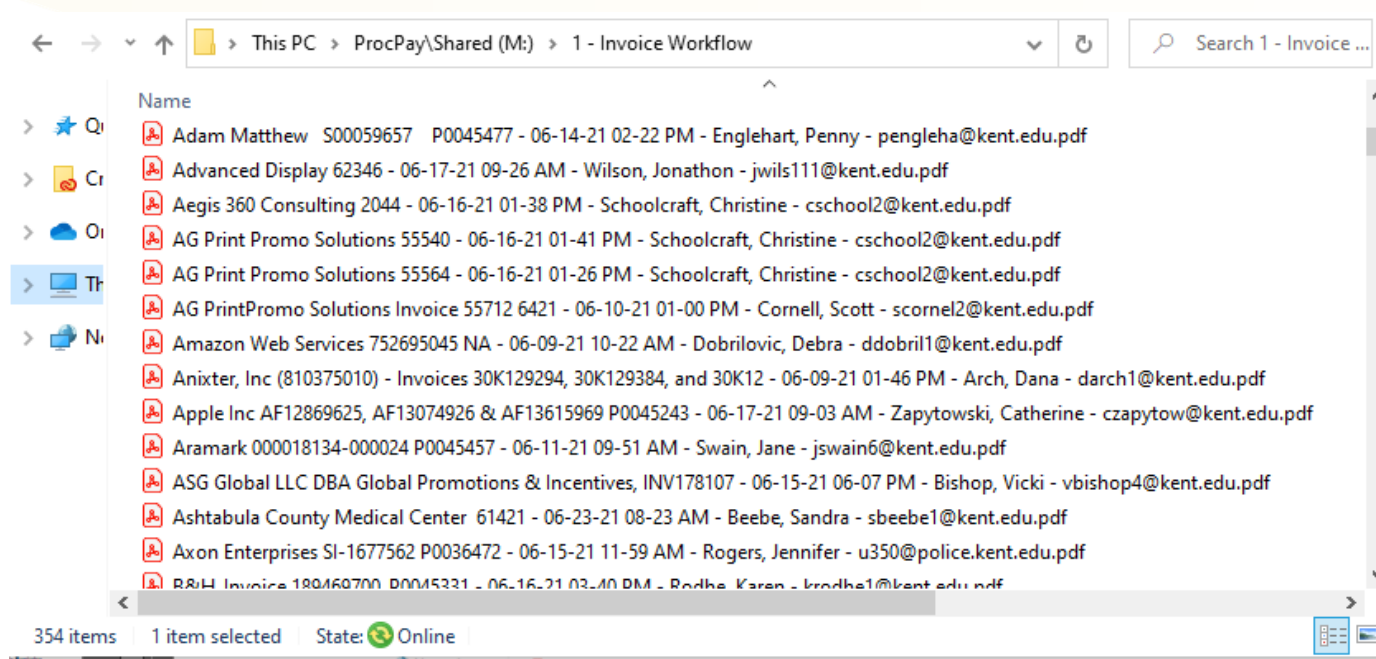
General Accounts Payable Reminders

- Email payment requests* to apinvoices@kent.edu
 - This will not change when we are all back on campus – paper payment requests are gone!
 - Do not send encrypted emails
 - Payment request form - SSN/EIN field has been removed, use most recent version: <https://www.kent.edu/accountspayable/payment-request-form>
 - PEDACKN – leave SSN field blank
 - Wire form – leave SSN/EIN and banking fields blank
 - We gather SSNs/EINs and banking info through PaymentWorks

* Payment requests = PO invoices, payment request forms, wire request forms

General Accounts Payable Reminders

- Email payment requests to apinvoices@kent.edu (continued)
- Put the vendor's name in the subject line and precede it with WIRE when applicable



General Accounts Payable Reminders

- Email payment requests to apinvoices@kent.edu (continued)
 - Send one payment request per email. This means:
 - Email can include 1 payment request form (or wire form) which can have 1 or more invoices for the same vendor, OR
 - Email can include 1 or more invoices to be paid against the same PO
 - Initiators and approvers are responsible for ensuring that vendors are onboarded through PaymentWorks and that payment requests are properly documented and approved.

General Accounts Payable Reminders

- Email payment requests to apinvoices@kent.edu (continued)
 - Approvals must comply with the instructions in the FAQ section of the AP website. Ask us for help or a demonstration if you do not understand how the email approvals should be formatted.
 - If a request is returned to you for correction, you must resubmit it as if was a new request.
 - Do not email it to an individual in AP.
 - Resubmitted requests go to the back of the line.

General Accounts Payable Reminders

- **Travel & Expense**

- University Travel Manual
 - <https://www.kent.edu/accountspayable/university-travel-manual>
- You must enroll in AP direct deposit in order to be reimbursed
 - <https://www.kent.edu/accountspayable/expreimdd>
 - Enroll before submitting your request in order to prevent delays
- Expense reimbursements must be completed before the individual's last day of work
- Chrome River
 - Use to reimburse (non-student) employees and GAs for KSU business expenses only
 - Look at the expense type when reviewing/approving
 - If an expense amount is incorrect, return for editing
 - Help guides and video are on AP website!

General Accounts Payable Reminders

- **Accounts Payable website**

- Primary resource for all AP questions
- www.kent.edu/accountspayable

- **Important Subsections**

- AP Staff Directory – AP email addresses and staff contact info
- Payment Processing – FAQs, forms, general payment info, independent contractors, gift reporting, compensating research subjects
- PaymentWorks Vendor Management – instructions and video
- Purchasing Card – Purchasing Card manual, Guide to Using Works, forms
- Travel & Expense – Chrome River manual, help guides, University Travel Manual

General Accounts Payable Reminders

- General AP questions – apcustomerservice@kent.edu
- Vendor onboarding/maintenance (PaymentWorks) questions – vendmgmt@kent.edu
- Pcard questions – pcard@kent.edu

**Last but not
least...**



Questions

Up Next

Lisa Steigmann-Gall, Lead Bus. Systems Analyst, Process
Evaluation and Improvement

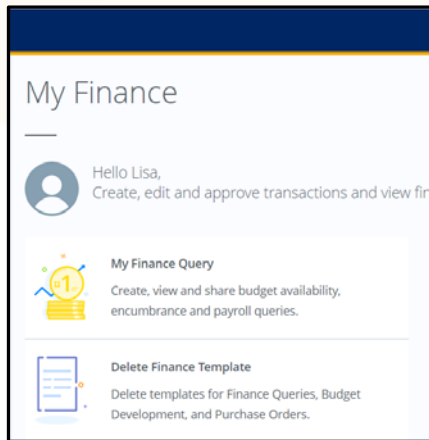


My Finance Self Service Banner Self Service 9

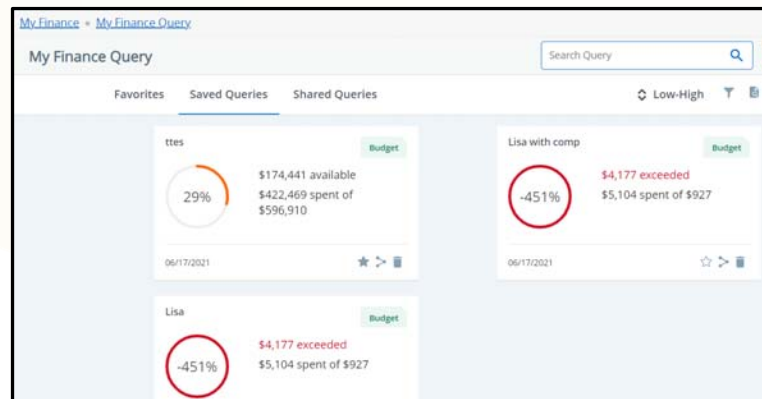
Presented by
Lisa Steigmann-Gall
Lead Business Systems Analyst



NEW LOOK



My Finance Landing Page



Query Dashboard

A screenshot of the 'View Document' form. It includes a 'Document Type' dropdown menu set to 'Journal Voucher'. Below it is a 'Document Search' section with a 'Choose Document Number' dropdown. The 'Document Number' field is marked with a red asterisk and contains the text 'Please Enter Document Number'. The 'Submission' field contains the text 'Please Enter Submission'. At the bottom, there are two buttons: 'VIEW DOCUMENT' and 'APPROVALS & RELATED DOCUMENTS'.

View Documents

Modernized and Simplified

FEATURE HIGHLIGHTS

- Real-time data in queries
- Favorite and shared queries in a Dashboard display
- Compliments the tools to review banner general ledger transactions and budgets for a complete picture when and how you need the data
 - Along with Banner Admin and Cognos Reports
- Enhanced search capabilities
- Drill-down capabilities
- Two new queries: Payroll Expense Report (like data in NHIDIST) and Multiple Year Report (like data in FRIGTD)
- Ability to see related documents in the View Documents section, i.e., Invoice for a Purchase order
- Mobile friendly

*“The only way to make sense out of change is to
plunge into it, move with it, and join the
dance.”*

Alan Watts

RESOURCES TO HELP YOU ‘**JOIN THE DANCE**’

- **My Finance Self Service User Group** on Teams
- **My Finance Training Guide and Video** on the Controller’s Resources webpage
- **Query Templates** for use are coming soon
- **Issues, and requests to be added to the User Group**, can be sent to ControllersOffice@kent.edu

Questions?

Next Up

Betsy Tierney, Manager of Cashiering Bursar Office



Lean Kent State Office 5S and Our Return to Campus

Presented by

Holly Slocum, Director of Process Evaluation and Improvement



How are you feeling
about returning to
campus?





CHANGE BRINGS



FRESH START



OPPORTUNITY



Sort - Getting rid of items that are not needed (paper or electronic files, emails, etc.)



Straighten (or Set in Order) - Having a place for everything, and everything in its place



Shine - Looking for different ways to keep things clean and organized



Standardize - Setting goals or standards for a consistent and organized work environment



Sustain - Making it a routine to maintain the correct methods and processes that you identified in the first 4 step

What is 5s?





Sort - Getting rid of items that are not needed (paper or electronic files, emails, etc.)

- If you haven't needed it for 18 months, do you need it now?

Opportunity – No new paper!

- Have you stored documents on your hard drive?
 - Shared Drive
 - OneDrive (**Opportunity** to save documents in a shared location that doesn't require a VPN)



Straighten (or Set in Order) -
Having a place for everything,
and everything in its place

- **Identify the items that are crucial to getting your work done and designate a spot for them**
- **Opportunity!** If this is not something you were doing before, now is a good time to think it through and start



Shine - Looking for different ways to keep things clean and organized

- **Give everything a thorough cleaning**
- **Opportunity!** If you enjoyed working from home because of your surrounding, consider bringing in some touches from home to make your workspace more comfortable
- **Opportunity!** Redecorate your workspace



Standardize - Setting goals or standards for a consistent and organized work environment



- Question if the old way is still the best way
- **Opportunity!** If you want to form new habits or routines, this is the time to do it
 - Straighten things up at the end of day
 - Taking walks a couple times a day
- If you are going to be hybrid, consider what is better done in the office versus at home
 - Creative thinking
 - Routine tasks
 - Collaborating
 - Learning from others



Sustain - Making it a routine to maintain the correct methods and processes that you identified in the first 4 step

- **Opportunity!** Establish new group norms with your team
- Remember Lean is all about respect for people
- Keep each other accountable



Sensitivity – Remember everyone will handle the transition back differently

- **Be patience**
- **Show compassion and empathy**
- **Be open to other's ideas**
- **Opportunity! Reconnect as a team**



PE&I COWORKERS NOT COMING TO THE OFFICE

Questions? Suggestions?

Next Up

(leave blank, Stina will fill in this section)



Reminder for Accepting Payments

Presented by
Betsy Tierney, Manager – Cashiering
Bursar's Office



Accepting Payments

- University administrative policy [3342-7-02.2](#) regarding protection of University funds.
- Once recorded in CASHNet, **submit deposits daily**:
 - Kent campus to Bursar's office
 - Regional campuses to deposit funds to central regional location or with their local bank
- Funds received during evening hours/weekends should be kept in a safe or suitable locked storage, and submitted for deposit the next business morning.

Accepting Payments

CASH

- Keep in a locked working drawer or lockbox.
- Verify cash amounts with a co/worker or supervisor.
- Seal cash your deposits with both individuals present.

CHECKS

- Keep in a locked working drawer or lockbox.
- Endorsement should include KSU “For Deposit Only” stamp & CASHNet transaction
- Only accept checks made payable to Kent State University

CREDIT CARD

- Adhere to University administrative policy [3342-7-01.2](#) regarding credit card security.
 - All methods must be reviewed and approved by Bursar’s Office and IT
 - Staff must complete annually a statement of compliance and security training
 - Always protect cardholder data
 - Do not store credit card numbers
 - Secure and monitor your terminals for tampering

Accepting Payments – CASHNet is now Transact

- Beginning June 28 - CASHNet is now **Transact Payments**



Questions?

Next Up

(leave blank, Stina will fill in this section)



New Fees for Study Abroad/Study Away Programs

Presented by
Stina Olafsdottir, AVP Bus & Admin. Services and
University Bursar



New Approved Fees for Study Abroad/Study Away Programs

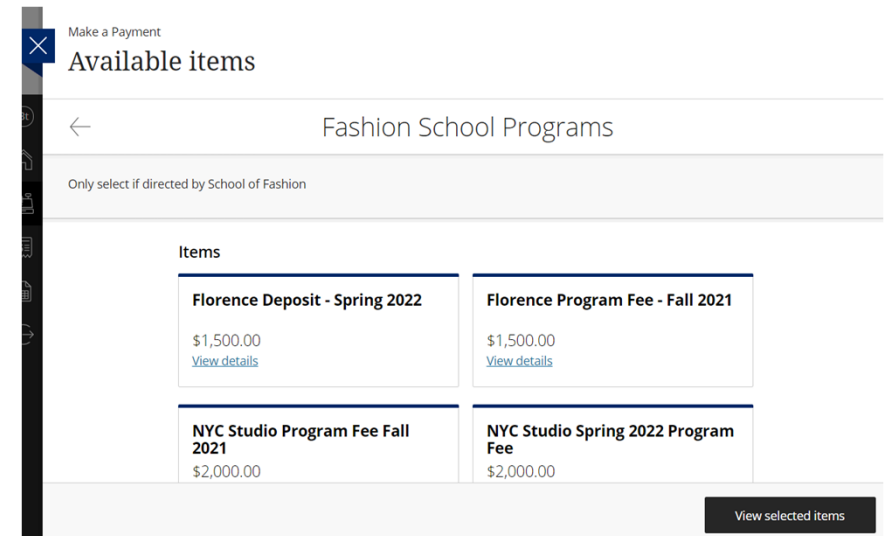
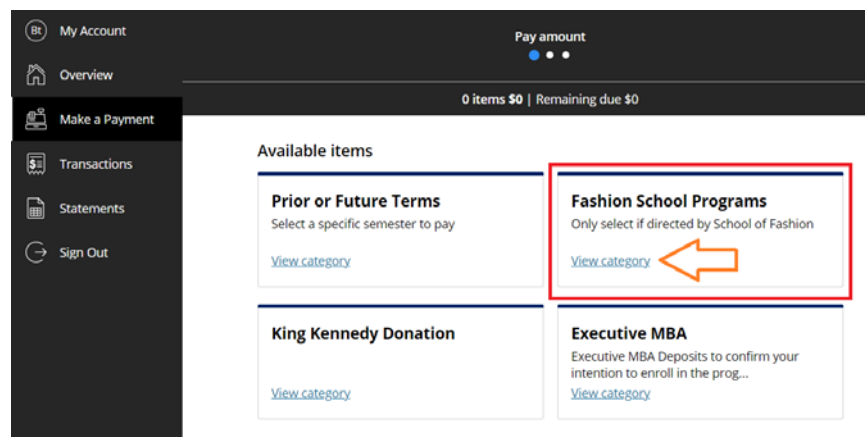
Board of Trustees approved two new fees related to study abroad/study away programs:

- Deposit fee
- Fees associated with the cost of travel such as partnership agreements, airfare, risk management, insurance, field trips, housing, etc.
 - Easy tracking and assessment to the student account
 - Please reach out to SRA@kent.edu for more information about processing travel fees to the student account

Deposits for Study Abroad/Study Away Programs

How will it work?

- Deposits from students will be managed via the KSU's online payment system.
- Easy access for students
- Easy tracking and collection of travel deposits for faculty and staff



6/23/2021

Deposits for Study Abroad/Study Away Programs

Each deposit will have a detailed description provided by the college or program

Available items

Item details

Florence Deposit - Spring 2022

\$1,500.00

DUE July 1st 2021: \$1,500 non-refundable, non-transferable program fee must be submitted by this date to secure enrollment in the Florence/Fashion School Spring 2022 Session (January 17 - May 10, 2022). Remaining fees and tuition is billed to student's Bursar account and is due approximately one month prior to the start of the semester program.

Items

Florence Deposit - Spring 2022	Florence
\$1,500.00 View details	\$1,500.00 View details
NYC Studio Program Fee Fall 2021	NYC Stu Fee
\$2,000.00	\$2,000.00

Cancel Add to payment

Deposits for Study Abroad/Study Away Programs

Once the student makes the payment, it shows up on their student account

Please contact cashiering at cashier@kent.edu or 330-672-2757 if you have any questions about the processing of travel deposits

6/23/2021

Available items

Item details

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DUE July 1st 2021: \$1,500 non-refundable, non-transferable program fee must be submitted by this date to secure enrollment in the Florence/Fashion School Spring 2022 Session (January 17 - May 10, 2022). Remaining fees and tuition is billed to student's Bursar account and is due approximately one month prior to the start of the semester program.

Items	
Florence Deposit - Spring 2022	Florence
\$1,500.00	\$1,500.00
View details	View details
NYC Studio Program Fee Fall 2021	NYC Studio Fee
\$2,000.00	\$2,000.00

Cancel Add to payment



Questions?


KENT STATE
UNIVERSITY

Quick reminders

- Link to today's recordings will be available later today using the link in the agenda or by accessing this link <https://www.kent.edu/bas/forum-information>
- Provide your topic suggestions and feedback @ <https://www.kent.edu/bas/forum-information>
- Request to be added/removed from BAS listserve @ <https://www.kent.edu/bas/forum-information>
- Next BAS Forum – Sept. 15