

CSCU | Students First

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| Planning Team | SF-AP/AR/BANNER SUPPORT/EXPENSE MANAGEMENT |
| Meeting Date | June 19, 2017 |
| Members Present | Kim Dragan – NWCC – Director of Financial & Administrative Services Jody Dear – CSCU – Associate Director for Business Services Kyle Frant – CSCU – Financial Services Madeline Santiago – CCC – Bursar Paul Creech – CCC – Department Chair Health Careers & Public Safety Jennifer Gray – ASCC – Director of Financial & Administrative Services |
| Members Absent | Chris Forster – Sub Team Lead – CSCU- Controller |

Meeting Notes

Minutes Approved – June 13, 2017 minutes were reviewed and approved.

Discussion of Jaggaer (formerly SciQuest) Demo June 16, 2017– Committee discussed how Jaggaer could be used effectively in a shared services environment.

- It is unclear whether the BOR is willing to purchase add on software or if the strategy will be to utilize Banner 9 to its full capacity
- It is unclear what features Banner 9 will provide

Pros

- Contracts depository / catalog management features
- Single sign on – fully integrates with banner
- Direct connection to AP (captures invoices automatically)
- Flexible approval routing
- Vendor self-service portal – they can check their open orders, payments, etc.
- Can establish recurring payments
- Reporting capabilities / Analytics
- Ability to link documents and attach/upload documents to PO
- Customizable form available – could be used for travel reimbursement form

Cons

- Expense – both start up and maintenance

- Software security – It appears that SciQuest has to establish and maintain the queues in the software. If we have a change in employment we would need to contact SciQuest to modify the system. This may be time consuming. It is unclear what the turnaround time is on this type of request.
- Training – SciQuest flips the system in to more of a “self-service” environment.
 - Who on campus will initiate the orders?
 - How will they be trained?
 - Will there be a campus presence with the knowledge to assist with initiating orders, researching, budget questions, etc.?

Position descriptions / skill sets – Discussed the organizational structure and the different positions and levels that would be needed to work AP, AR, Banner Support and Travel in a shared services environment.

- Committee began looking at other colleges that have shared services structures and discussing how some of these workflows could be implemented
- Kim is working on job descriptions and a workflow for AP to be discussed at a future meeting

Future Meeting Dates - TBD