



QUARTERLY BUSINESS OFFICERS MEETING

APRIL 2017



TODAY'S AGENDA

- I. Talent@Iowa Payroll Committee Results (Cheryl Reardon)
- II. AFR Projects Update (Selina Martin)
- III. Desktop Receiving Updates and System Enhancements (John Watkins)
- IV. Presentation: *Work Organization and Time Management - Getting Things Done in the Midst of Chaos* (Susan Johnson)



TALENT@IOWA PAYROLL COMMITTEE RESULTS

CHERYL REARDON, CHIEF HR OFFICER & ASSOCIATE VICE PRESIDENT











Payroll Alignment Update






Recommendation Accepted (MOU drafted)

- The UI Payroll will have a dual (solid) report to UHR and the Chief Financial Officer in F&O.
 - Develop Payroll Users Group to gather input and enhance relationships across campus
 - Re-evaluate alignment in 12-18 months.
 - Launch Phase II working committee of the T@I Payroll Committee - to assess and recommend strategies and priorities to increase efficiencies and meet campus needs.
-
- **Co-Chairs:** Suzanne Hilleman, Terri Hein
 - **Membership:** Dan Schropp, Tara Black, Rachel Quinlan, Kyle Anson, Dave Bergeon, Selina Martin, Audra Haddy, Angie Johnson, Debby Zumbach, Joni Troester (liaison)

Phase 1 Committee Status

PHASE 1	Initiation	Planning	Implementation	Evaluation
 Governance Council	✓	✓	✓	
 Immigration	✓	✓	✓	✓
 FMLA	✓	✓	✓	
 IT Transition	✓	✓	✓	
 HR Independent Organization	✓	✓	✓	
 Payroll	✓	✓	✓	

Phase 2 Committee Status

PHASE 2	Initiation	Planning	Implementation	Evaluation
 Data-Driven Decisions	✓	✓		
 Benchmarking	✓	✓		
 Diversity	✓			
 Talent Acquisition	✓			
 Training and Onboarding	✓	✓		



AFR PROJECTS UPDATE

SELINA MARTIN, ASSOCIATE CONTROLLER



CURRENT TECHNOLOGY PROJECTS

1. Enhancements to *Requests for New Chartfields & WhoKeys* Application
2. Implementation of new Access/Security Model for EFR & EFTx
3. Rewrite of PayCV (limited scope)
4. Development of a separate CTJ (Cost Transfer Justification) application for other applications to use

NEW SECURITY MODEL FOR AFR SYSTEMS

COMPONENTS

EFR = Electronic Financial Reports system

- TDR's
- EFR Summary Reports
- Grant Summary Reports
- EFR Dashboard

EFTx = Electronic Financial Transactions applications

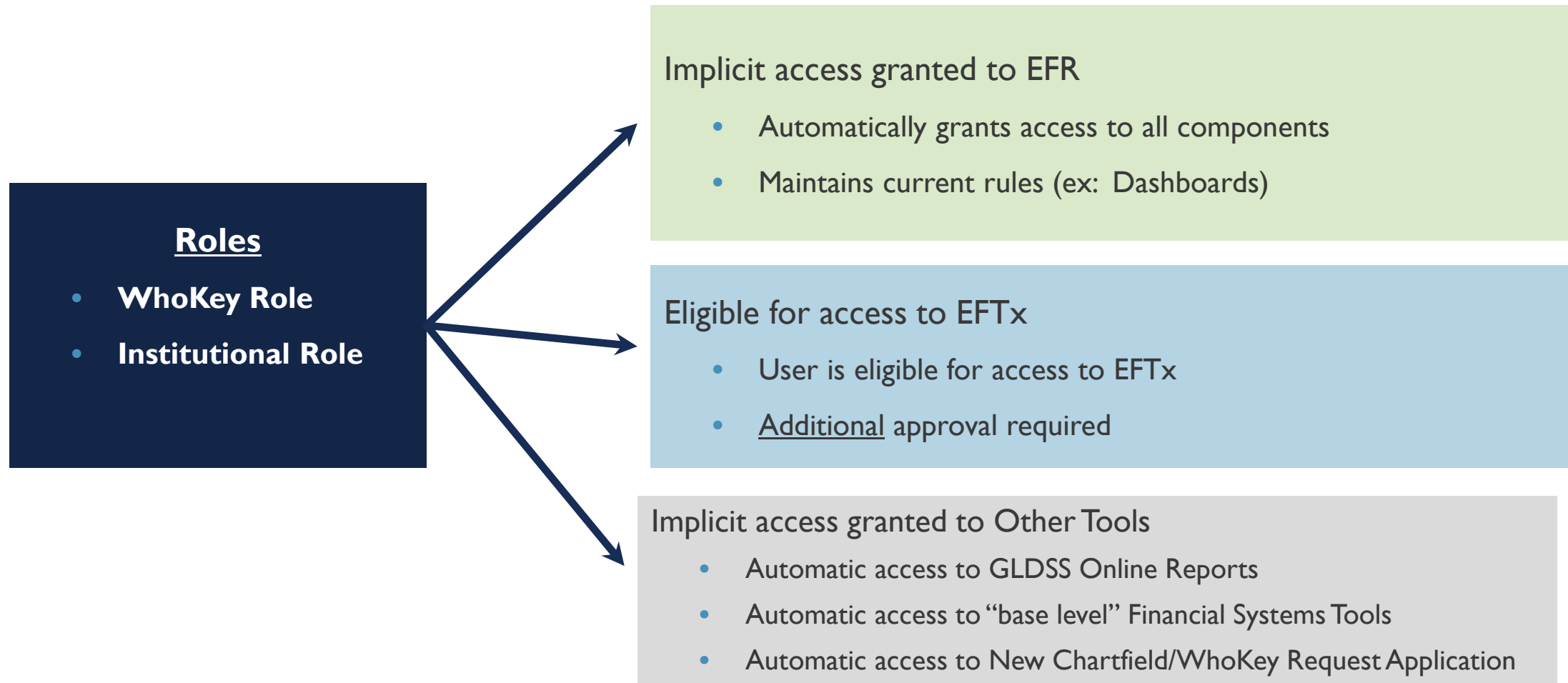
- WebCV
- PayCV
- GLJE
- WhoKey Admin

Other Tools & Applications

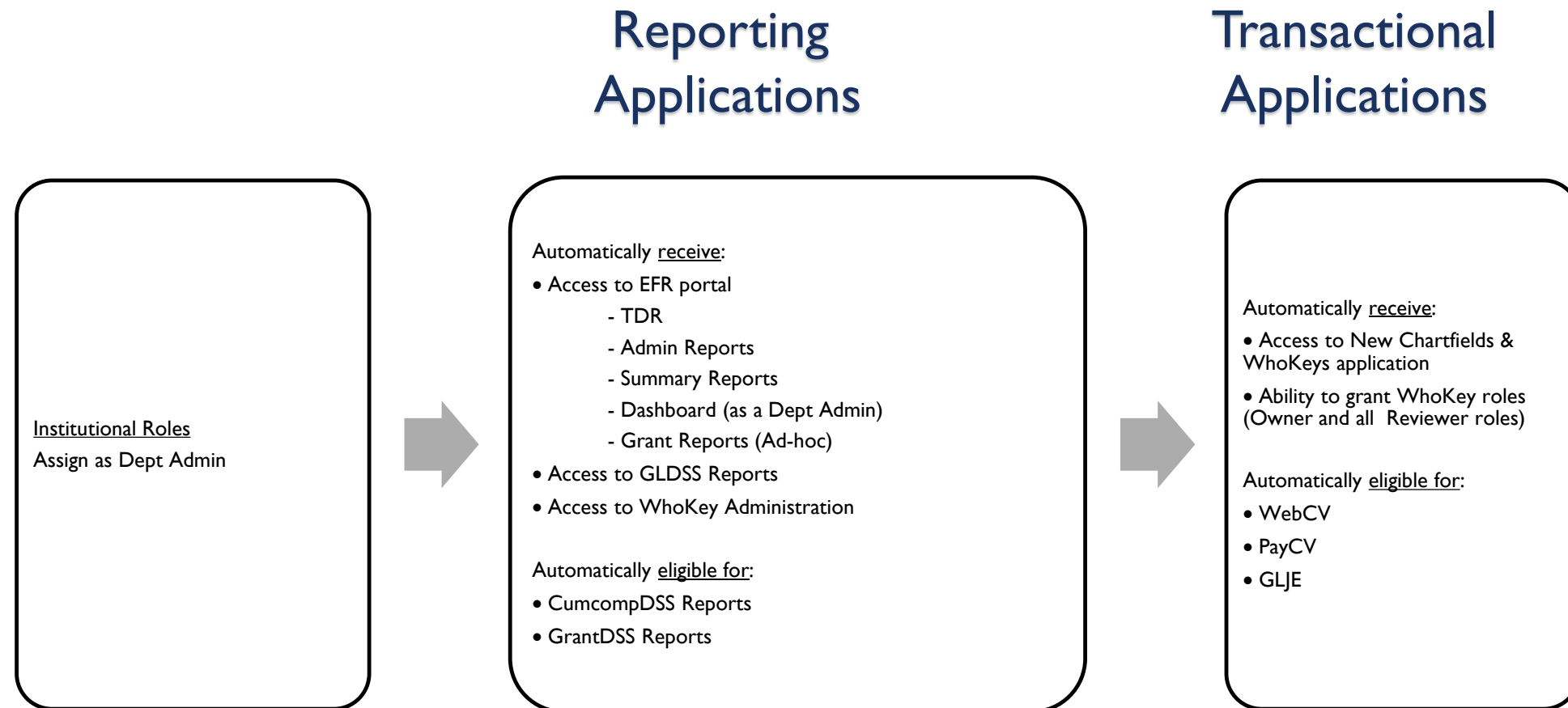
- GLDSS Online Reports
- Financial Systems Tools
- New Chartfield/WhoKey Request Application

NEW SECURITY MODEL FOR AFR SYSTEMS

HOW IT WORKS



EXAMPLE: YOU ADD A NEW *DEPT ADMINISTRATOR* (NEW EXTERNAL HIRE)



AFR TECHNOLOGY PROJECTS – PAYCV LIMITED SCOPE REWRITE

Accounting & Financial Reporting
PayCV

Payroll CV: Standard Entry Form

EMPLID:

University ID:

Last name:

First name:



NEW FRINGE IACTS (INSTITUTIONAL ACCOUNTS)

#	What has changed?	IACT
1	Added 22 new fringe benefit IACTs. <i>(Effective 7/1/2017)</i>	5311, 5313, 5325, 5350-51, 5360-61, 5525, 5550, 5560, 5961-64, 5966-67, 5971-5974, 5989, 5991
2	Repurposed 8 existing, active fringe benefit IACTs. <i>(Effective 7/1/2017)</i>	5320-21, 5520, 5960, 5965, 5970, 5975, 5992

PAYCV REWRITE – BUSINESS OBJECTIVES

More Efficient

- Use of default values
- Save “Favorites”
- Better response time
- Expanded functionality
- Less costly to maintain

More Accurate

- Improved accuracy in users entering data
- More accurate salary & fringe reporting
- Goal = correct pay in the correct pay period!

Improved Customer Experience

- Improved user interface
- Enhanced daily reporting @ person level
- Users can delete entries before they are loaded to GL
- User activity reporting

PAYCV REWRITE – NEXT STEPS

- Collaborating with Grant Accounting Office
- Soliciting input from Payroll & Benefits
- Will engage limited number of campus users in the future
- Timeline – will have a better idea this summer

CASH HANDLING – UNANNOUNCED VISITS

■ Purpose of visit

- To help bring awareness of cash handling functions and importance of strong internal controls
- To determine that roles in documented procedures are consistent with staff performing the role
- To verify that each staff member involved in the process is current on cash handling training
- To verify that each staff member involved in the process understands his/her role in the procedure

CASH HANDLING – UNANNOUNCED VISITS

■ Visit Details

- Introduce themselves and explain the nature of the visit.
- Speak to the person in each role and observe as they walk us through their process.
- For units that have outstanding advances -- ask to count the cash on hand and review the current reconciliation
- Ask questions from the cash handling template
- Observe controls related to access to safe (ask to see the safe, ask for names of those that have access to it & verify that reconciler has absolutely no access to the safe.
- Discuss any variances from the procedures & explain how to corrected (with *Cash Handling Control Manager*)

■ Post Visit Report Out



DESKTOP RECEIVING UPDATES AND SYSTEM ENHANCEMENTS

JOHN WATKINS, DIRECTOR OF STRATEGIC SOURCING



UPDATED PRICE MATCHING TOLERANCES

- April 10th matching tolerances for Purchases Order pricing will be changed:
 - **Current:** \$2.00 unit price and \$100.00 total line amount
 - **New:** \$100.00 unit price and \$1,000 total line amount
- Impact:
 - Fewer emails to campus regarding low-dollar pricing exceptions
 - Ensure vendors are paid on time
- Existing exceptions and orders will be manually overridden following the new thresholds.

DESKTOP RECEIVING UPDATES

- April 10th Desktop Receiving thresholds will be updated
- **Current:**
 - Purchase Requisition \$5,000 or greater with institutional account 6200 – 6235
 - Purchase Requisition/ Blanket Order Vouchers \$10,000 or greater
 - Blanket Order/Contract Order with institutional account 6200 – 6235 that is \$5,000 or greater or Capital Equipment
- **New:**
 - Purchase Requisition \$10,000 or greater (institutional account 6200 – 6235)
 - Purchase Requisition/Blanket Order Vouchers \$25,000 or greater
 - Blanket Order/Contract Order with institutional account 6200 – 6235 that is \$10,000 or greater or Capital Equipment
- Unchanged: Purchase Requisition for Capital Equipment

DESKTOP RECEIVING UPDATES

- April 10th Desktop Receiving thresholds will be updated (cont.)
- Impact
 - Annually approximately 6,750 invoices will not require desktop receiving of which 4,835 were match exceptions delaying payment
 - Increase campus effectiveness and ensure vendors are paid on time
- Existing voucher match exceptions will be manually overridden following the new thresholds

DESKTOP RECEIVING UPDATES

- May 1st Desktop Receiving Application will be revamped
 - Improved ease of use
 - Easier to find vouchers requiring receiving
- Demonstration

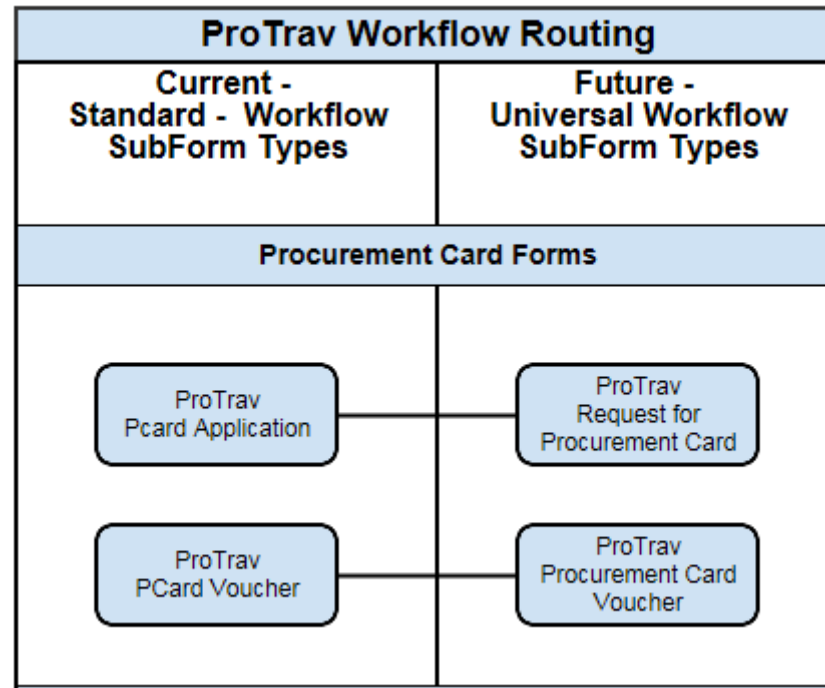
UNIVERSAL WORKFLOW PROTRAV

- Integrating ProTrav with Universal Workflow
 - New forms will be visible in Self-Service soon
 - Working with Universal Workflow team to support copy of existing paths (if preferred)
 - Tentative go-live July 2017

UNIVERSAL WORKFLOW

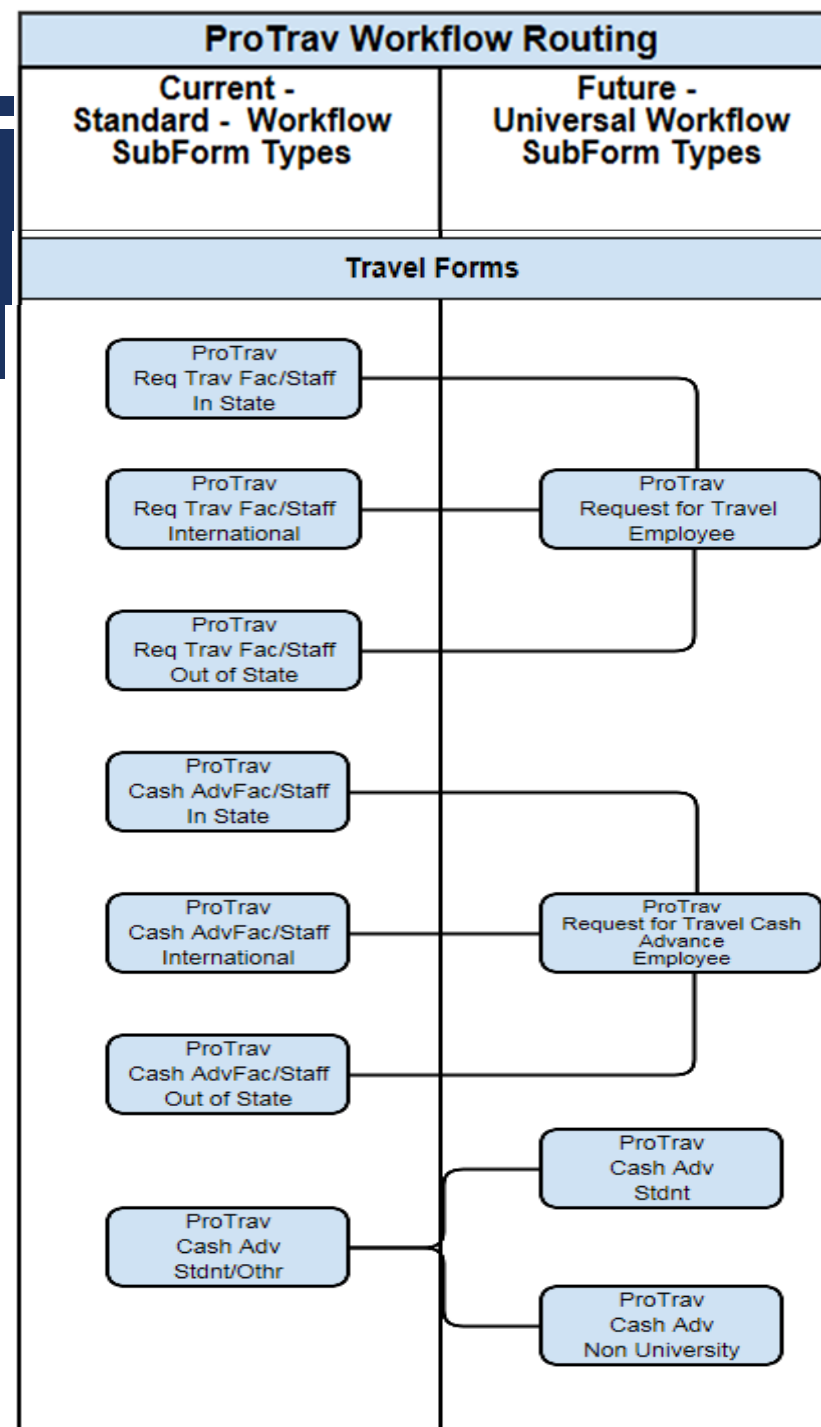
PROTRAV – PROCUREMENT CARD

■ Compare



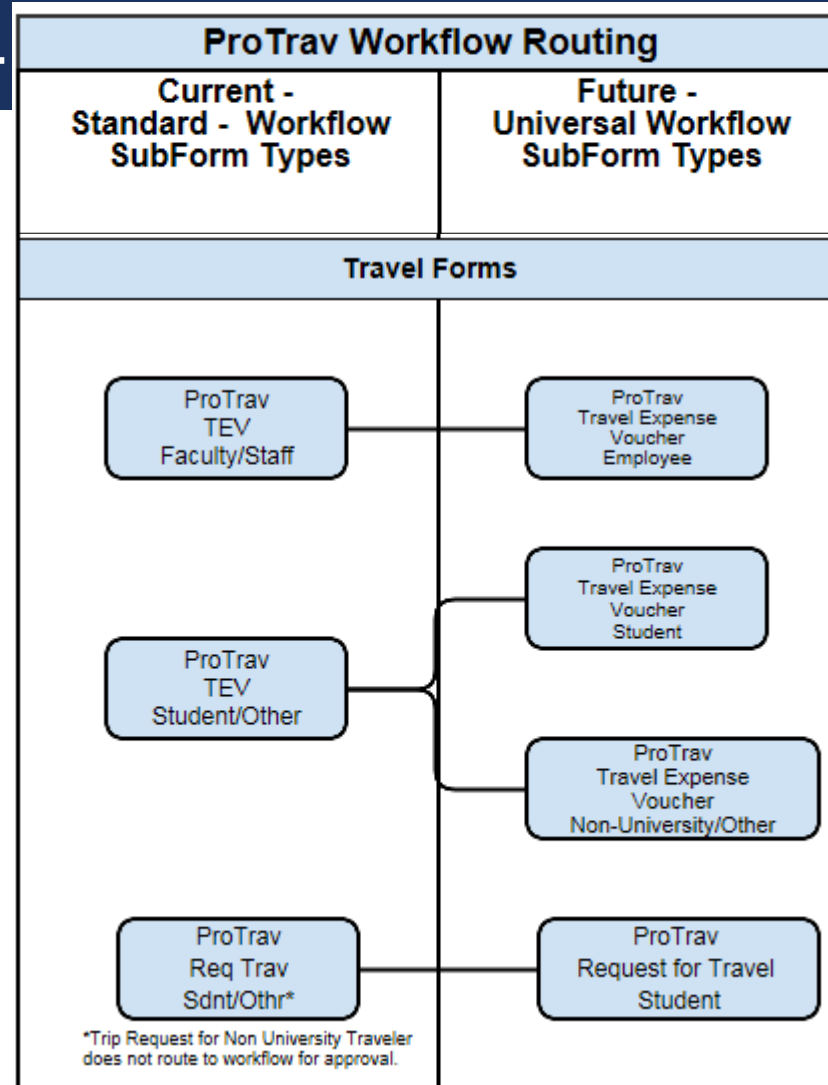
PROTRAV – TRIP

■ Compare



PROTRAV – TRAVEL

■ Compare




Next Meeting:

June 16th

10:00-12:00

UCC 2520D

A 3D rendered scene depicting a meeting. A white, featureless humanoid figure stands on the left, holding a long pointer stick and pointing it towards a green chalkboard. The chalkboard is mounted on a silver tripod stand and displays the text 'Next Meeting:', 'June 16th', '10:00-12:00', and 'UCC 2520D'. In the foreground, three identical white humanoid figures are seated at separate rectangular tables, each with a matching chair. They are all facing away from the viewer towards the chalkboard. The entire scene is set against a plain white background with soft shadows cast on the floor.



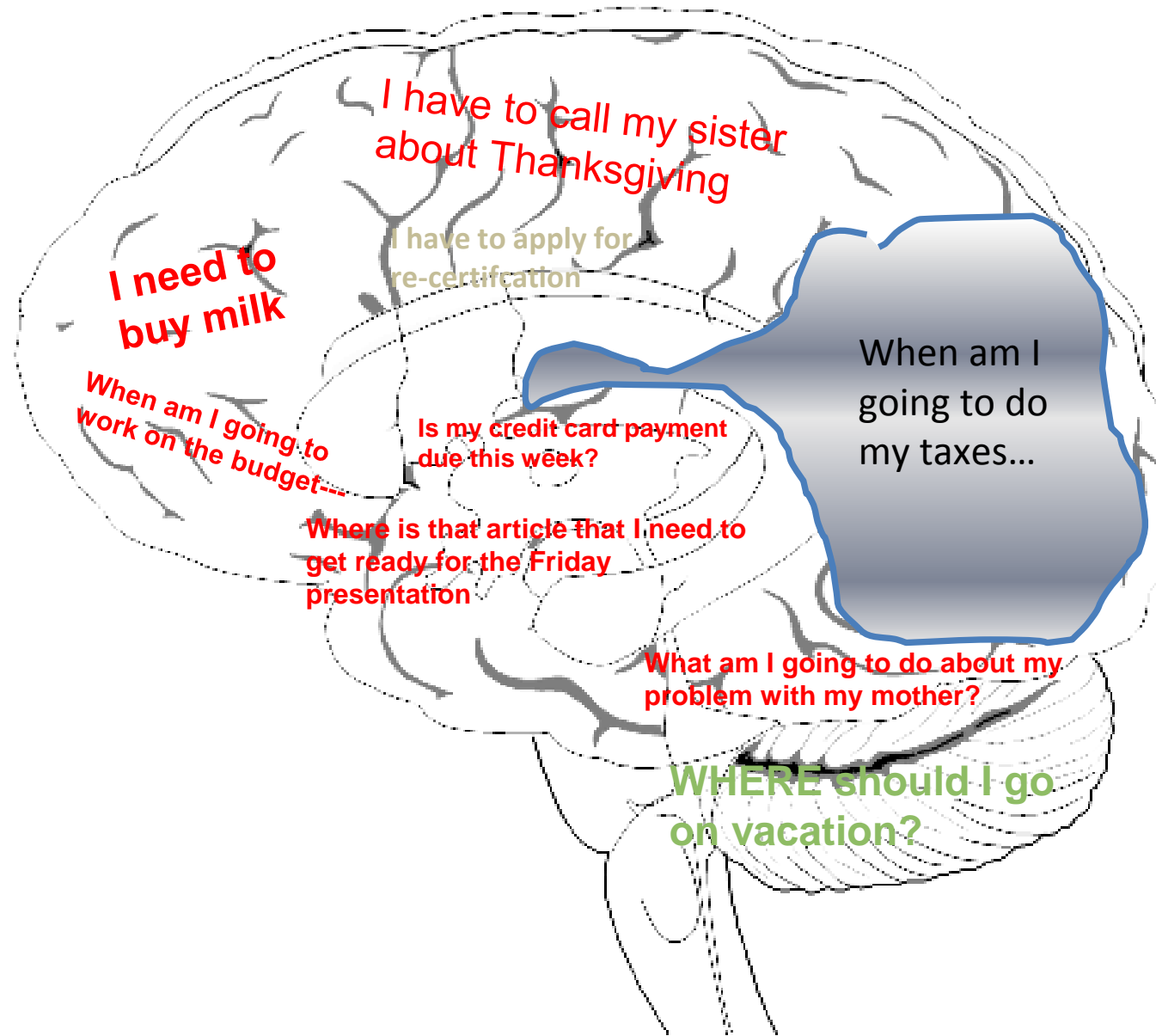
ORGANIZATION AND TIME MANAGEMENT – GETTING THINGS DONE IN THE MIDST OF CHAOS

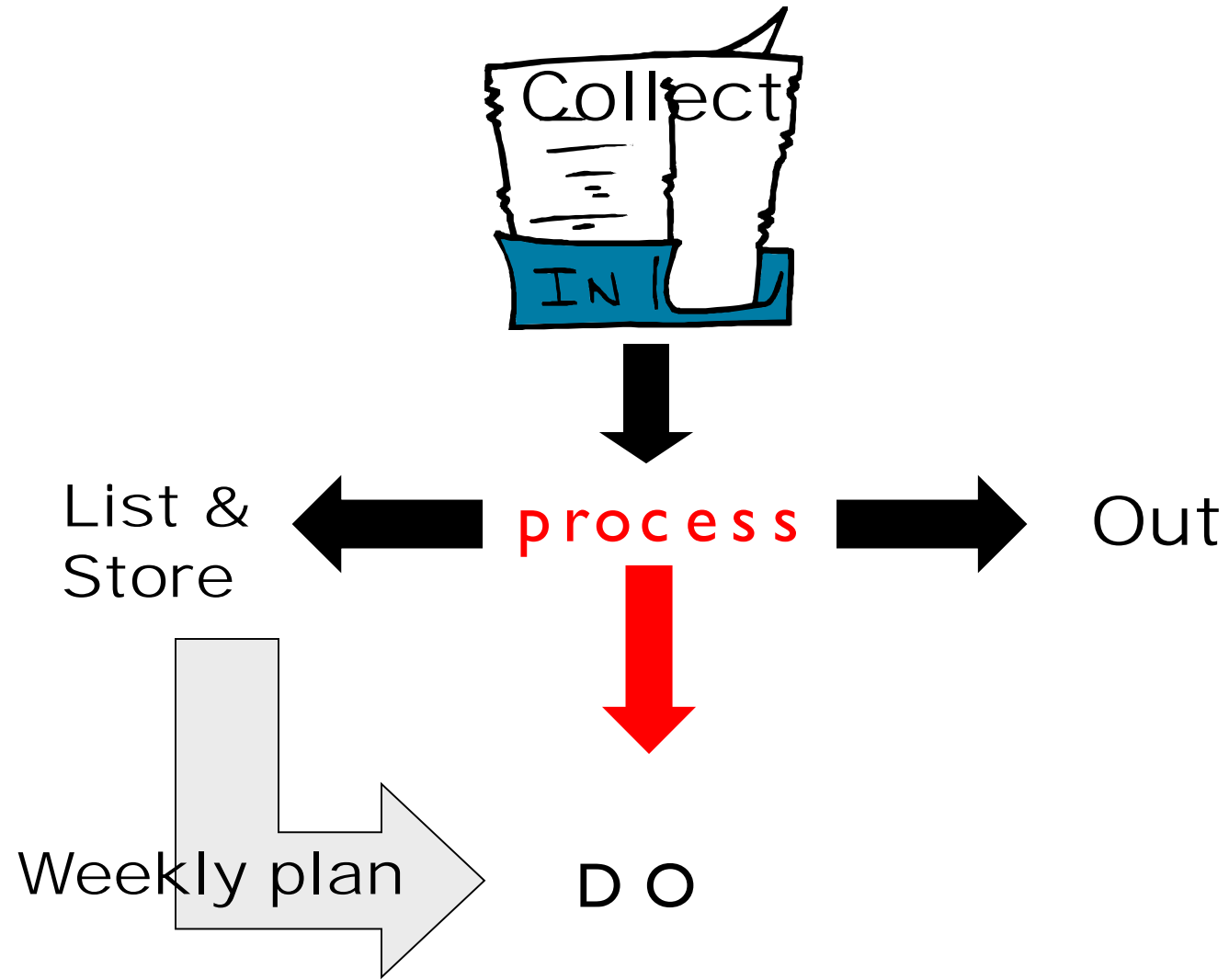
SUSAN JOHNSON, OFFICE OF THE OMBUDSPERSON





TRACKING WORK





Simple, single running master to do list

MASTER TO DO LIST

- call John (351-5555) re: Thurs meeting
- Draft introduction for budget report
- Buy 3-hole punch for office
- Start planning Spring break trip
- Purge one file drawer
- read article on strategic planning
- Google Vitamix reviews
- Develop specs for Smith proposal
- Complete Ale's performance review
- order fresh Turkey
- call dentist office for appointment
- investigate new wi-fi plan
- take jacket to tailor for fitting
- place ad in ICPC
- renew Chamber Membership
- email Jane Doe re: her info request
- reorganize the break room
- plan office holiday party

To - d o l i s t

☐ Trip to Italy

☒ Call Jane

☐ Grant

☐ Mail check

☒ Taxes



❖ OUTCOMES (aka **Projects**)

❖ TASKS (aka Actions)

☐ Trip to Italy

☐ Call Jane

☐ Grant

☐ Mail check

☐ Taxes

G T D m o d e l

D a v i d A l l e n , G e t t i n g T h i n g s D o n e , 2 0 1 5

W o r k a s p r o j e c t s & n e x t a c t i o n s

Project = Outcome I want to achieve

(deliverables, decisions, problem solutions, plans)

Prepare and submit FY budget to Director by April 1

Actions = Tasks / to-dos

(required to complete projects OR “stand alone”)

Email Sponsored Programs to double check indirect rate.

Spend one hour drafting objectives for FY budget.

Call dentist to schedule cleaning.

PROJECT LIST

Next Action List

PERSONAL

Project related actions

Project → ☐ Next action

PROFESSIONAL

Project → ☐ Next action

Stand alone actions

☐ Action

☐ Action

PROJECT LIST

PERSONAL

❖ Trip to Italy →

Next Action List

Project related actions

☐ Call travel agency

PROFESSIONAL

❖ _____ →

☐ _____

Stand alone actions

☐ _____

PROJECT LIST

PERSONAL

- ❖ Plan Sept 2017 trip to Italy with my sister



Next Action List

Project related actions

- ☐ Call travel agency (444-555) to ask if there are tours available in early Sept

PROFESSIONAL

- ❖ _____



- ☐ _____

Stand alone actions

- ☐ _____

PLANNING



Weekly review/update

- Review to-do lists
 - Done?
 - Still relevant?
 - What needs to be added?
 - Priority for this week?
- Review calendar
 - Forward: at least 3 weeks
 - Back: the preceding week
 - Add resulting new to-do's to your list



Pick no more than 3 chunks of high priority project work that you aim to complete this week

Work on the unit AY17 budget proposal

➔ Review budget guidelines and draft goals for budget

Work on party plans

➔ Finalize party guest list and send invitations

Daily task plan

Must* be done today

- .
- .
- ...

Aim* to do today

- 1..
- 2..
- 3..

* The **deadline** is today

* “It will be so great if I get this done today but nothing bad will happen if it don’t.”



EXECUTING

Work on a high priority task before you do anything else at the beginning of the work day, including email.





Optimize your use of available time:

Combine regular intensive “deep” sessions, with smaller tasks/ thinking fit into the “nooks and crannies” of your regular day.



Work as if you are going on vacation tomorrow.



- Rapid decisions
- Tasks done quickly rather than “perfectly”
- Push to complete

- **Do it now!**

- **The “2 minute rule”**

David Allen (2015) *Getting Things Done*, 2nd edition

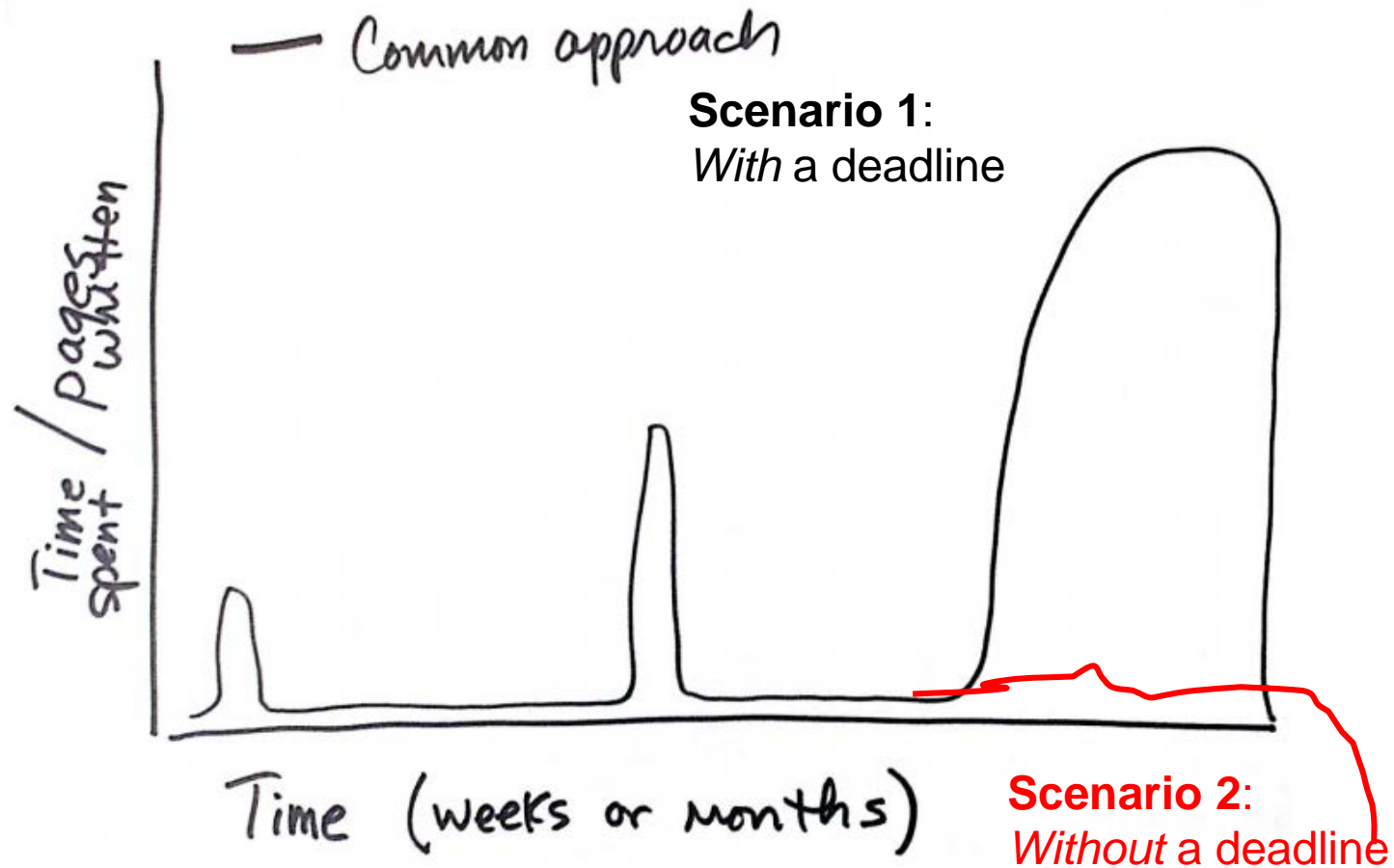


• Batch similar tasks



- ❖ EMAIL
- ❖ PAPERWORK
- ❖ ???

- **High impact projects**



Execute Regularly.

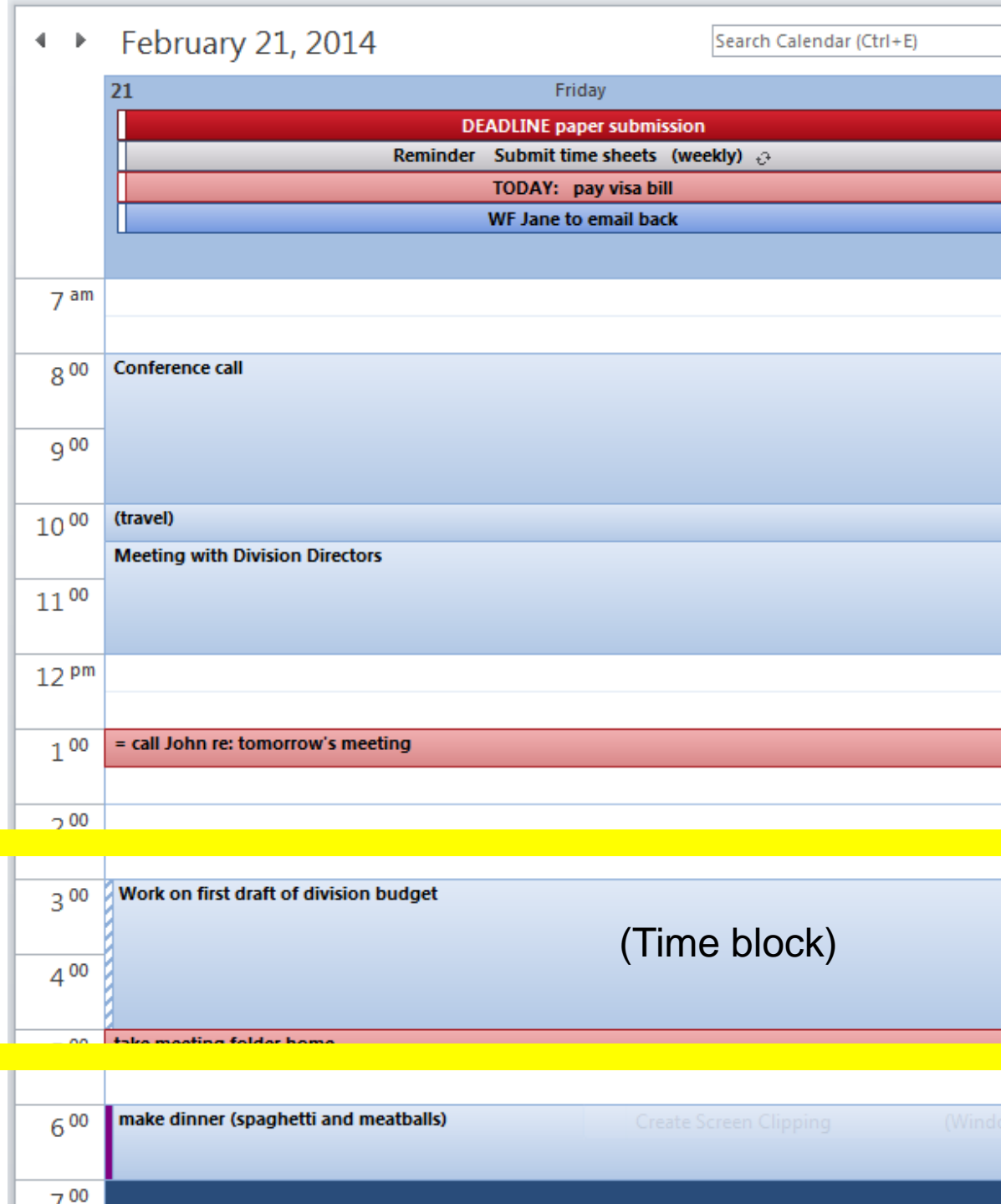


“...[make] real progress **every single day.**”

- John Kotter. *A Sense of Urgency* (2008)

Konosuke Matsushita Professor of Leadership, Emeritus at
the Harvard Business School

Schedule “time blocks” for work that requires focus.



If you are having trouble starting *or* sticking with a time block

... try the **Pomodoro Technique**



Write down what you are going to do

25 + 5
25 + 5
25 + 5
25 + **15**
Repeat as needed

Manage interruptions

Francesco Cirillo
<http://www.pomodorotechnique.com/>
the Pomodoro technique

* Search your phone's play store for a Pomodoro app



BETTER EMAIL MANAGEMENT

How often should you process your email?



How often should you process your email?

OFTEN

nsive
ail

week



Unresponsive
to anything but email

2x per minute

Inbox

Folder List

- Outlook Today - [Mailbox - Johnson, Susan]
 - @ Waiting For (1)
 - @ xCurrent trip or conference call
 - Calendar
 - Contacts
 - Contacts / Productivity
 - Deleted Items
 - Drafts
 - Fax Status
 - Inbox**
 - Inbox SWAN (38)
 - Inbox talk requests (1)
 - Infected
 - Journal
 - Notes
 - Outbox
 - Sent Items
 - Tasks
- Personal Folders
- Public Folders

From Subject R...

There are no items to show in this view.

INBOX ZERO!

0 Items



2:15 PM

srj206's Buddy List ...

Inbox - Microsoft ...

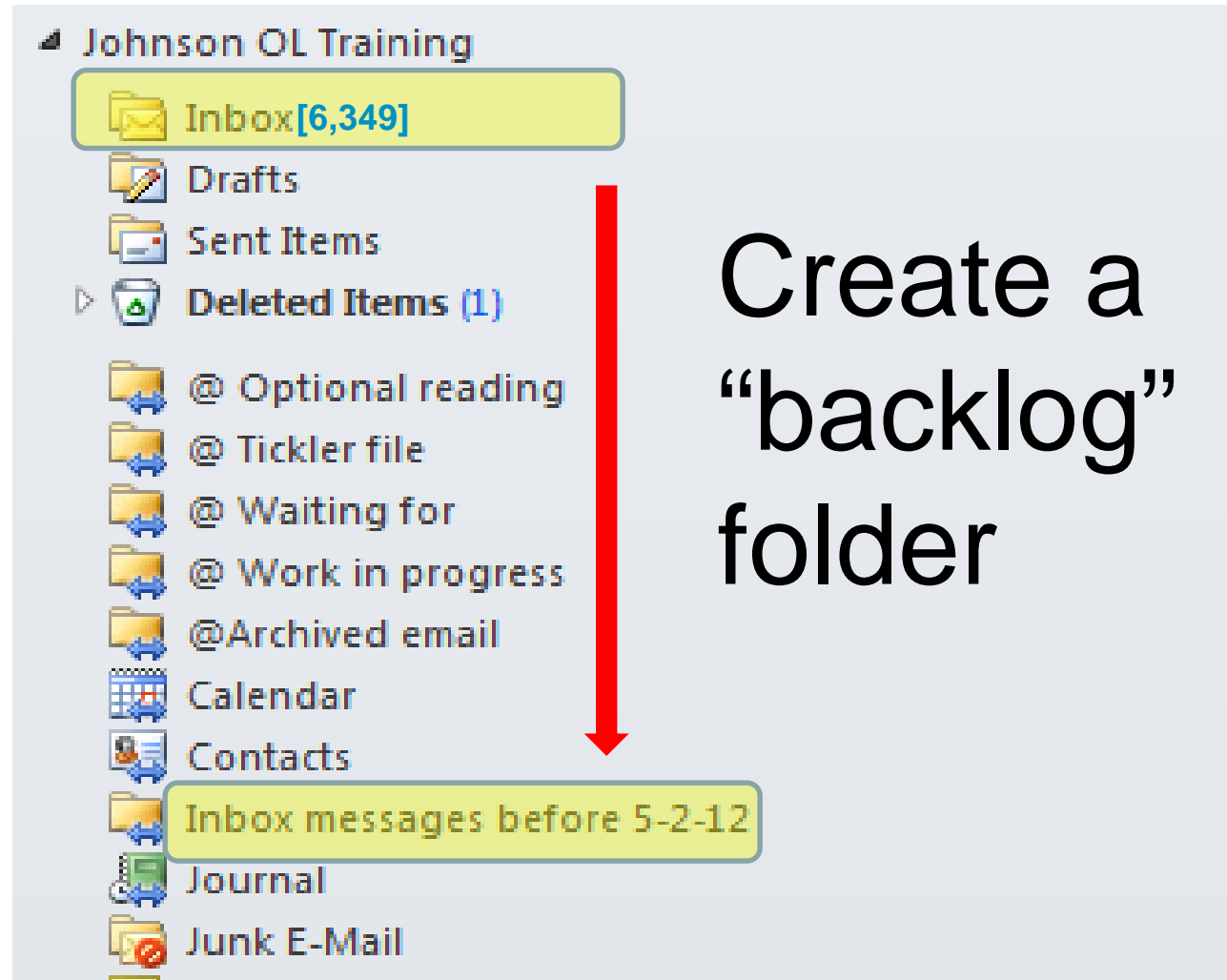
Microsoft PowerPoint



The Goal...

- Take each message as far as you can toward completion, and then delete, or store somewhere other than the Inbox.

If you have lots of messages in your Inbox....



WARNING: if your Inbox has subfolders, *move them out from under first*

Create folders to store message associate with current work

Johnson OL Training

Inbox

Drafts

Sent Items

Deleted Items (1)

1

@ Optional reading

2

@ Tickler file

2012.06.10 Professor Smith visit

2012.07.02 NIH Conference call

2012.07.06-09 EWIM Washington DC

3

@ Waiting for

4

@ Work in progress / Projects

Manuscript review due September 30

Paper - Hot flashes in men

Paper - Temperature regulation in the 6th decade

Secretarial hire

Syllabus revision for 2nd year student course



Messages saved for future reference



The path to empty...

- Don't look unless you have time to process.
- If you are processing a “batch”
 - 1st pass: delete based on *subject*, without opening (optional)
 - 2nd pass:
 - Start with either the oldest or the newest
 - Then process in order - no skipping!

- **Decide the first time!**

- ☐ Delete

- ☐ File

- ☐ Store in “Optional reading” folder

- ☐ ID messages best dealt with by phone or in person

- ☐ **Do / reply now**

- **Decide the first time!**

- ☒ First pass processing and responses

- ~ **90% completed**

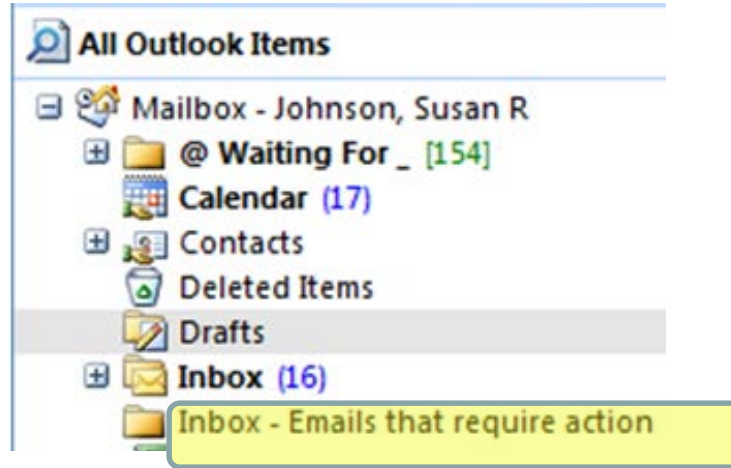
- ☐ The remainder deferred...

- First, ask *why* you can't do it now.
 - Then, **what do you have to do next?**
 - Store the message where you will be sure to get back to it.

Options to store deferred emails in Outlook

1. Add to the to-do list by flagging

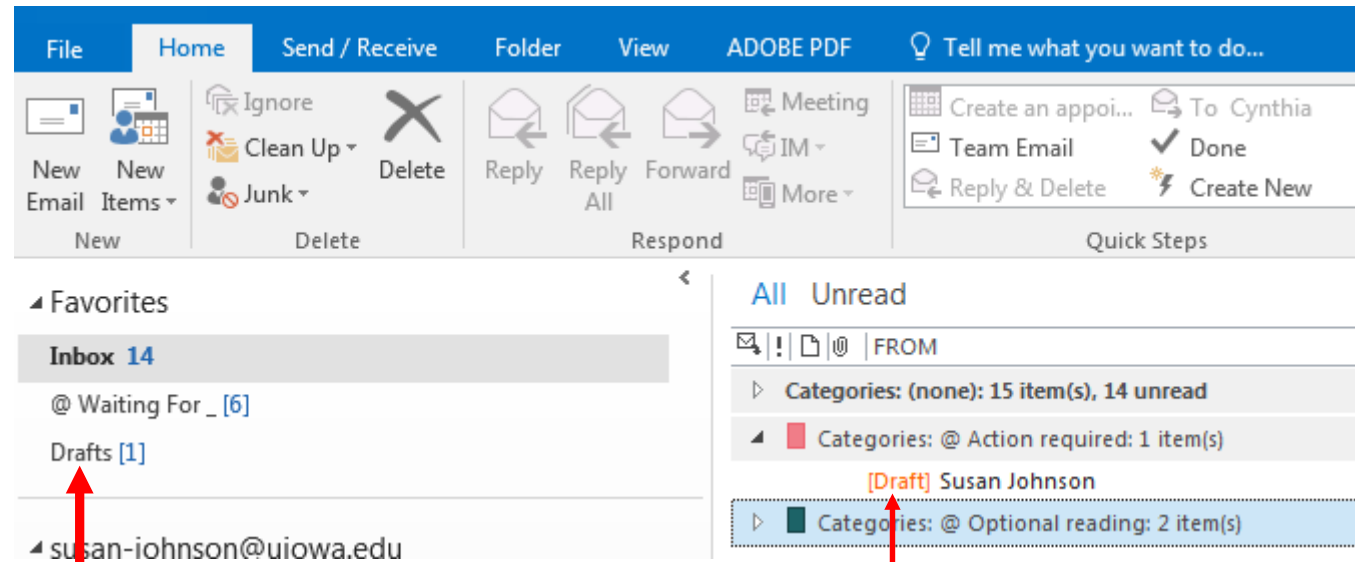
2. File in a folder



3. Start a draft response, which will save to the Drafts folder

4. Segregate from unprocessed messages in the Inbox, using categories or flags

Using the draft folder for deferred messages



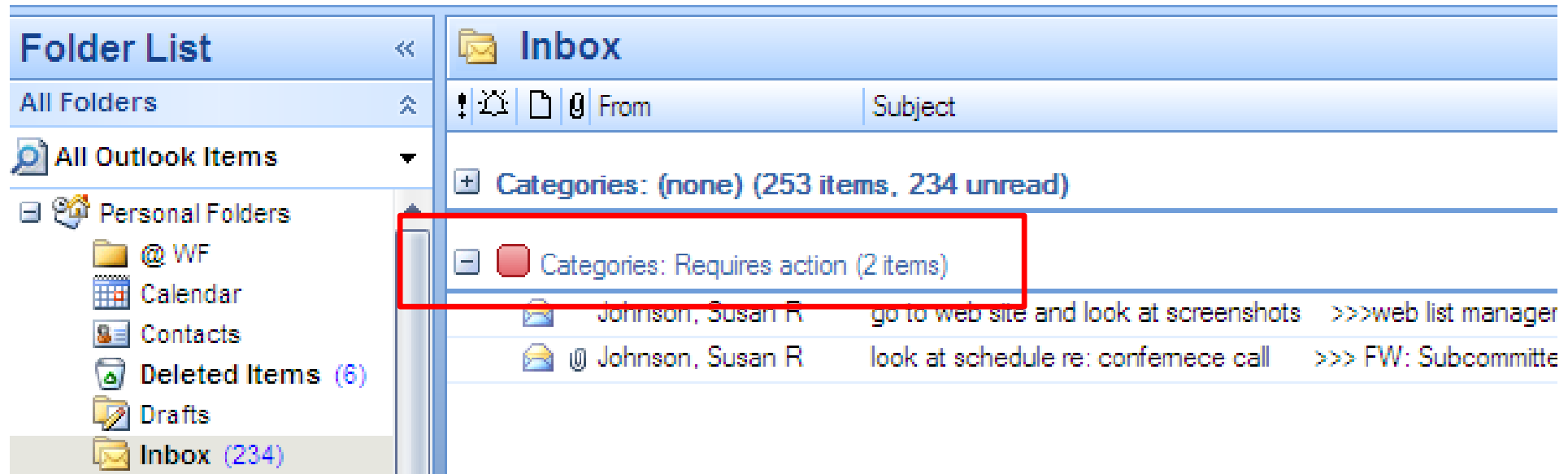
Move *Drafts* to ► Favorites

When you are going to defer:

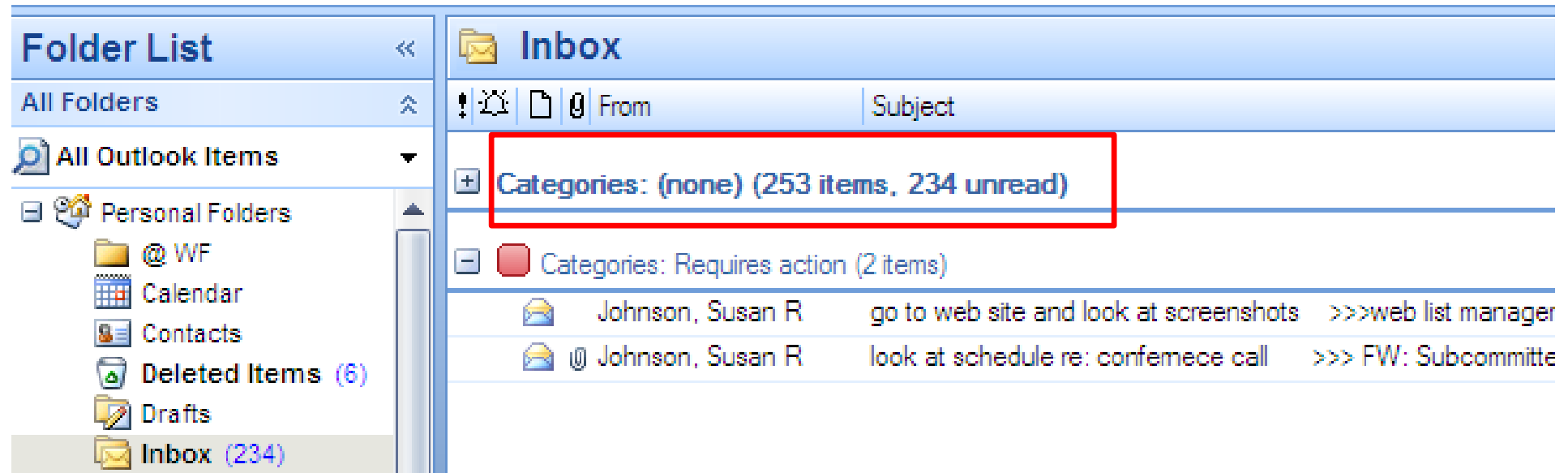
1. Open a reply
2. (option: take out the To: address)
3. Start a draft reply, or record what you need to do next
4. Save & close

Mark the message with a flag, or add a “to-do” category

Using a categorized view of inbox

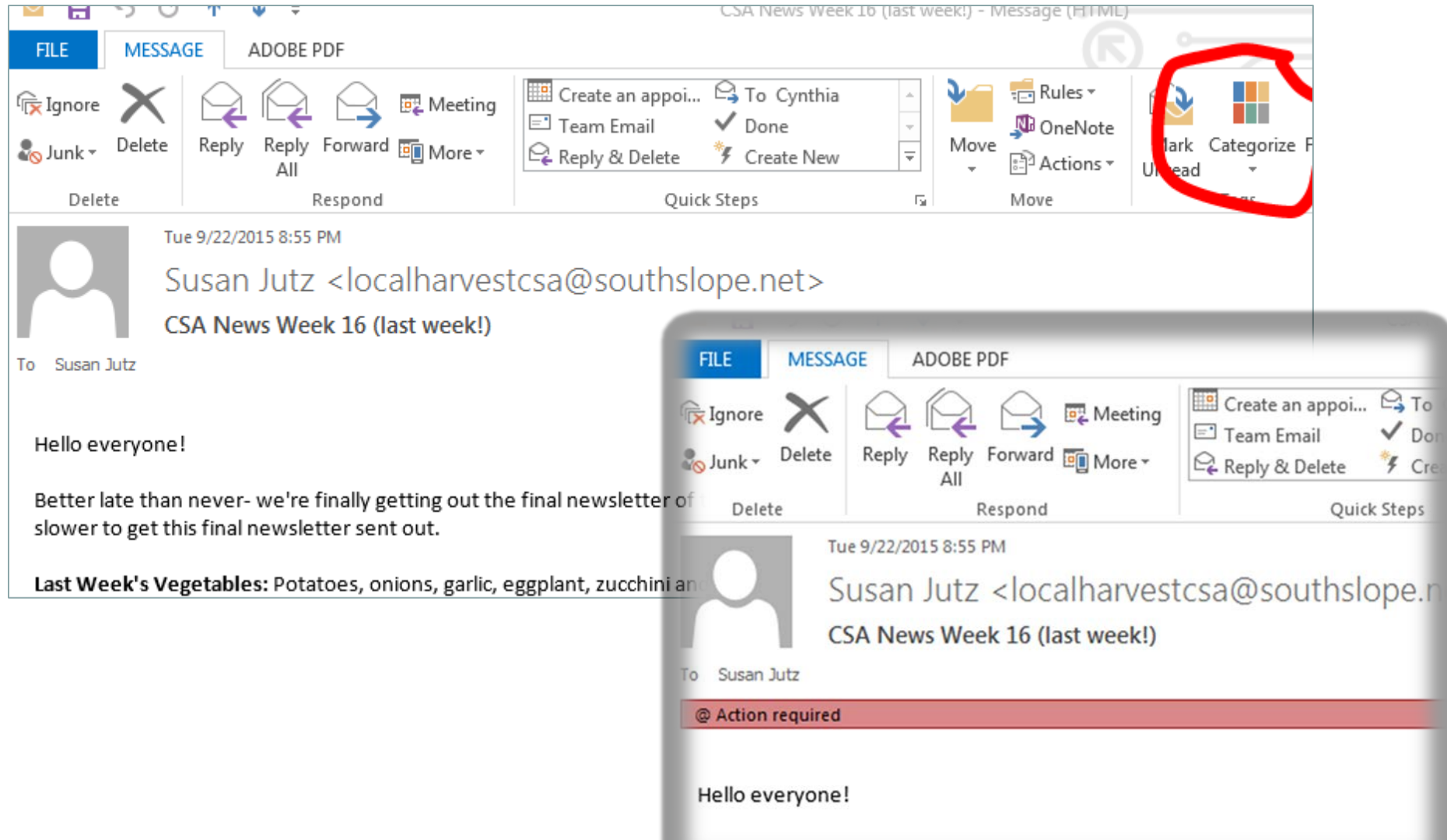


Using a categorized view of inbox



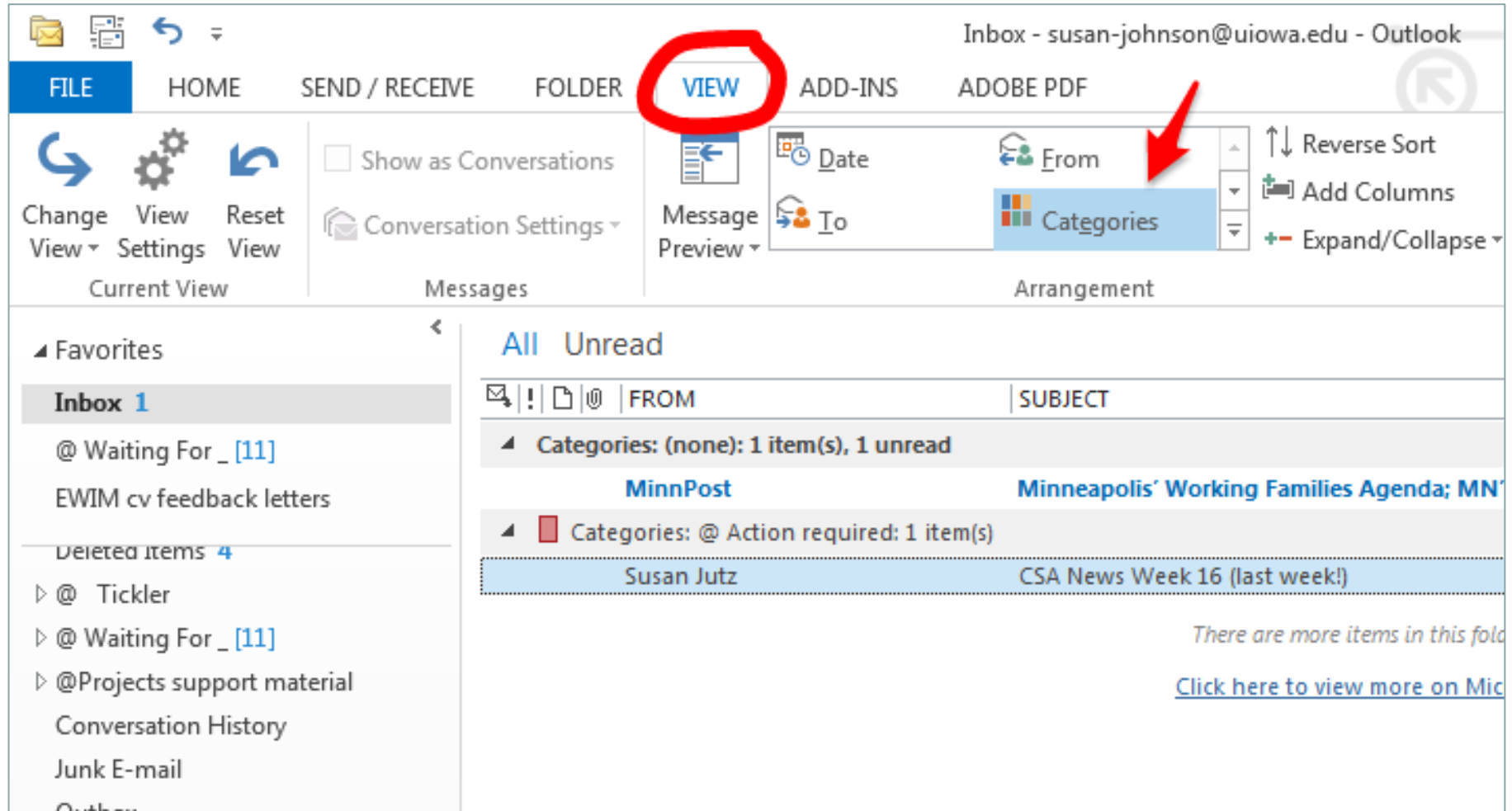
How to use a categorized inbox for deferred messages:

FIRST Assign a category (e.g. “Action required”) to the message



How to use a categorized inbox for deferred messages: :

SECOND change inbox view to “view by category”






The Goal...

- Take each message as far as you can toward completion, and then delete, or store somewhere other than the Inbox.



“Yes, it works!”

 Send	From ▾	susan-johnson@uiowa.edu
	To...	you@amc.edu
	Cc...	
Subject:		Lunch?

| Hey you!

How about lunch next week. I could do Tuesday from noon-1:00. If that works, I'll make reservations, and then you know where we're going and when we need to leave.

FYI – I decided to change my email account from Yahoo to Gmail. The new address is sally10000@gmail.com

Sally



The original email

- ☐ **Reply immediately**
- ☐ **THEN delete**

Calendar

- ☐ **Create appointment**


Contact List

- ☐ **Update contact**

Email folders

- ☐ **Put your reply message in @Waiting for folder**

“Yes, it works!”

 Send	From ▾	susan-johnson@uiowa.edu
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Sally



Productivity Resources (selected)

David Allen

- *Getting Things Done 2nd Edition (2015)*
- An effective complete workflow and planning system



- <http://www.asianefficiency.com/>
- Covers all areas; free and paid resources online (newsletter, podcasts, videos, white papers, courses)

Michael Linenberger

- <http://www.michaellinenberger.com/TheOneMinuteToDoList-Ebook.pdf>



Susan R. Johnson

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**Contact me
anytime with
questions or
comments, and,
get articles on my
website**

thriving
a m i d s t c h a o s

www.thrivingamidstchaos.com