

R'FBO

Insights

University of California Riverside
November 2011 Issue / Volume III

UC RIVERSIDE UNIVERSITY OF CALIFORNIA
Finance & Business Operations

[Office of Finance & Business Operations \(FBO\)](#)

Vice Chancellor Gretchen Bolar
Assistant Vice Chancellor Georgianne Carlson

[FBOIT Services](#)
[Risk Management](#)

[Financial Services](#)

Associate Vice Chancellor Bobbi McCracken

[Accounting Services](#)
[Accounts Payable and Travel](#)
[Payroll Services](#)
[Student Business Services](#)

[Capital Programs](#)

Associate Vice Chancellor Tim Ralston

[Capital Resource Management](#)
[Capital Planning](#)
[Physical Planning](#)
[Real Estate Services](#)

[Campus Architect](#)

[/ Sustainability](#)

Associate Vice Chancellor Don Caskey

[Facilities, Transportation, and Safety](#)

Associate Vice Chancellor Mike Miller

[Administrative Services](#)
[Building & Special Services](#)
[Environmental Health and Safety](#)
[Facilities Maintenance](#)
[Fleet Services](#)
[Transportation and Parking Services \(TAPS\)](#)

[Human Resources](#)

[/ Labor Relations](#)

Associate Vice Chancellor Marilyn Voce

[Materiel Management](#)

Director Russ Lewis

[Campus Purchasing](#)
[Storehouse / Receiving / Surplus](#)
[Printing / Mail Services](#)

[Resource Planning and Budget](#)

Associate Vice Chancellor Matt Hull

[UCPD Riverside](#)

Chief Mike Lane

Finance and Business Operations Spotlight on *Working Smarter*

Creating PaperLess Trails

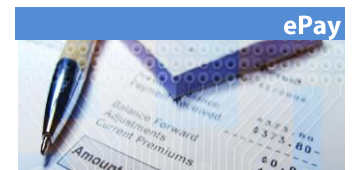
The [University of California \(UC\) Working Smarter Initiative](#) is challenging each UC location to develop and implement operational efficiencies that enhance the quality of services and build a sustainable financial model to carry the University forward. In playing its part in building a sustainable model for the future, UC Riverside is, among many campus-wide efforts, working to reduce waste. A key component of that effort is to cut back on the amount of paper consumed throughout campus, with the ultimate goal of creating a culture of sustainability that minimizes the use of paper to the greatest extent possible. Already, UC Riverside has implemented a number of systems, tools, and programs that have markedly decreased the volume of paper consumed. Three online tools exemplifying the campus commitment to this goal are described below. Each tool provides authorized users with easy and immediate access to information through the web and “paperless trails” concerning actions and information, which in the past would have existed only in paper form.



A web-based tool, [iReport](#) converts commonly used reports into a digital/electronic format for ease of distribution, access, and storage. These electronic documents are stored in four repositories: 1) General Operating; 2) SIS; 3) Accounting; and 4) Human Resources, which are further delineated by categories, such as Payroll, Admissions, Housing, and Accounting, to name just a few. Each category contains a variety of reports such as Personnel Status, Application Status Summaries, Resident Hall Monthly Charges, and Fees. A search engine provides a quick means of navigating to a specific report. This robust search feature allows reports to be located by a unique identifier or key words in the descriptive title. Since iReport is a web-based tool, users have access to reports at any time of the day and from on and off campus. This distributed access has greatly lessened the need to print and store reports on local systems. As the campus continues to convert more reports to this new format, they will be made available in iReport.



[iRecruit](#) is an online application that consists of a comprehensive set of staff recruitment management systems. Fully integrated with the [Enterprise Access Control System](#) and the [R'Space portal](#), iRecruit provides authorized users with visibility to recruitment activities in their particular span of responsibility. It also contributes to the campus sustainability efforts in that it serves as a repository of all applications, eliminating the need for paper copies.



[ePay](#) is a new online payment request application. This online tool represents a significant leap forward in processing payment requests in terms of efficiency, transparency, and effectiveness. Designed to be the “smartest system” ever developed and deployed on the UCR campus, ePay replaces the “paper-based” Form 5 check request process. Payment requests for petty cash reimbursements, refunds, business meetings, and entertainment events may now be paid either by check or Electronic Fund Transfer (EFT) using this web-based tool. The application includes an option to allow for the scanning and uploading of supporting documentation. Greatly reducing the need to maintain paper files, ePay enhances campus sustainability and helps the campus community become greener.

Current Division Initiatives**Document Management***Finance and Business Operations**Service Center Takes the Lead*

Like all campus units, the human, financial, and physical resources of the Finance and Business Operations (FBO) Service Center (SC) are limited. Under the leadership and direction of VC Bolar, the FBO SC is well underway in implementing a shared services model to deliver human resource and financial management services to the FBO divisions. A key value of this shared services model is continual evaluation and improvement in business processes, service delivery, efficiency, and accuracy. Under Vice Chancellor Bolar's vision for lean initiatives, the FBO SC has made a commitment to a paperless office environment to deliver its services. Using existing technical tools and campus enterprise systems, the FBO SC has implemented document management solutions which reduce the amount of paper and file storage space needed to effectively operate. The paperless process also enables transparent and efficient work assignments and tracking.

The FBO SC receives and processes a wide variety of requests for Human Resources/Personnel Services through a group email box. Using Microsoft Outlook 2010 on the Exchange platform, the email request is assigned to a central task list. An electronic folder hierarchy is created for each type of service request and the related email and attachments are electronically filed. Many of these electronic folders contain service requests that involve multiple transactions which, if printed and stored in file cabinets, would generate reams of paper and take up valuable physical space. On those occasions when there is an approved request to review the contents of a specific folder, the required electronic files can be retrieved and, using Microsoft Outlook functionality, incorporated into a single Adobe Acrobat file and routed via email to the requestor.

In addition to utilizing Microsoft Outlook, the FBO SC also leverages the content management features in the campus enterprise systems. Specifically, in iRecruit and iReview service center staff upload all pertinent documentation and analysis which relate to the specific action. Additional copies are not kept outside of the respective enterprise system. The goal is to minimize paper and create a complete record for which division management can readily access.

In the near future, the FBO SC will implement Microsoft SharePoint to continue to enhance the paperless environment. The SharePoint platform will enable the service center to upload financial statements and analyses for each FBO Division and enable paperless shared access to the files for division management and service center staff.

Enterprise Electronic Document Imaging/Content Management Chancellor, EVC/Provost, and Vice Chancellor-Finance and Business Operations Commitment

The Office of the Chancellor, the Executive Vice Chancellor and Provost (EVC&P), and the Vice Chancellor-Finance and Business Operations (VC-FBO) generate a considerable amount of internal correspondence which is distributed to a multitude of units throughout the campus. The distribution of one signed document can generate dozens of copies. To reduce the amount of paper and greatly alleviate the administrative burden of copying and distributing hard copies, the three organizations are instituting a protocol that will greatly minimize the amount of paper being used, as well as increase administrative efficiencies. Internal correspondence generated on behalf of and signed by the Chancellor, EVC&P, VC-FBO, or, on case-by-case basis their designates, will be electronically scanned and disseminated by email. Those receiving the correspondence are being encouraged to file the document in an electronic folder. With these relatively simple steps, promoting administrative efficiencies, reducing paper consumption, and more effectively using physical space, campus sustainability will be favorably impacted.

Getting Started**Conduct a Periodic Assessment**

Each FBO division is being charged with conducting a waste evaluation to help identify the paper the organization generates and its path, from point of purchase to ultimate disposition. Opportunities for eliminating the need for hard copy documents and maximizing the use of technology solutions should be identified and appropriate changes to business practices made. This assessment may be as simple as a visual survey of the trash or may entail a more detailed process of sorting, weighing, and measuring the volume of all the materials in the waste stream. It can also be as easy as looking at paper purchasing records. In conducting a survey of how and when paper is used, consider these questions.

- What type of work is done in each area?
- What activities produce excess paper?
- What excess paper can be reused or recycled?
- What waste can be reduced or prevented?

In getting started with a simple paper reduction program, units are encouraged to implement cost effective strategies and devise easily measurable metrics to assess the impact of the program. The data each unit gathers can be used to establish a baseline for comparison. Conducting an annual waste evaluation will serve to allow each unit to track and share results and to identify best practices that enhance future paper reduction, reuse, and recycling efforts throughout FBO.

Individual Actions

Within each of the FBO divisions, employees are being encouraged to play an active role in implementing an effective paper reduction strategy. A few suggestions in kicking off this initiative to reduce paper use include:

- Do not print out emails unnecessarily.
- Create and distribute documents electronically.
- Review and edit draft documents on-screen rather than on paper.
- Use "Track Changes" "and Comment" features rather than printing hardcopies for markups.
- If a lengthy report is needed to be printed, consider adjusting the paper settings to allow more text to fit on each page or print two pages on each sheet of paper.
- Employ office intranet solutions that allow open or password-protected access to documents, presentations, or databases through an office network or via the web.
- Proof documents on-screen when possible and always use Print Preview and the Spelling and Grammar check before printing a document.
- Adjust the default settings on word processing programs to use a slightly smaller font and slightly wider margins.

Working Smarter**...In a Leaner and Greener Environment**

Clearly, working smarter provides opportunities to develop and create initiatives to reduce paper usage and promote a leaner and greener environment. Whether it be implementing rudimentary recycling practices or developing a complex online document management system, the Office of the Vice Chancellor-Finance and Business Operations (FBO) is encouraging each of the FBO divisions to assess their current business practices with the goal of establishing a work environment in which the use of paper is greatly reduced.

...Toward a Paperless Environment

In the state of California, paper is the second-largest component of the commercial waste stream, accounting for over one quarter of all commercial materials disposed. The [California Integrated Waste Management Board](#) (CIWMB) offers tips, promotional materials, and other resources for office paper reduction programs. As FBO divisions develop best business practices to reduce paper usage and implement ongoing initiatives to foster a paperless culture, they are being encouraged to collaborate and share ideas, as well as seek guidance from the Campus Sustainability Coordinator, John Cook.

R'FBO Insights**November 2011 Issue****FINANCE & BUSINESS OPERATIONS (FBO)**

UC Riverside
900 University Ave
Riverside, CA 92521
(951) 827-7310 Phone
(951) 827-5200 Fax
<http://fbo.ucr.edu>

EDITOR
Tim Willette

R'FBO Insights is published by the Finance and Business Operations unit of the University of California Riverside.

Your questions and suggestions are welcome. Please email comments to tim.willette@ucr.edu.

DESIGN
Janette Ducut, Ed.D.