

PROJECT RECHARGE

The logo for Project Recharge features a red arrow pointing left, partially overlapping the word 'PROJECT'. To the right of the word 'RECHARGE' is a yellow lightning bolt pointing downwards, which is partially enclosed by a grey swoosh that also overlaps the word 'RECHARGE'.

Three systems, recharged

Jill Schunk, AVP Procurement Services
Joan Hagen, AVP & University Controller
Rob Lowden, AVP Enterprise Systems



WHAT IS PROJECT RECHARGE?

Update, replace, & consolidate

Kuali Financial System

- Updated to the latest version

Travel and Expense System

- Replacing TEM with a new system based on Chrome River

Procure to Pay (P2P) System

- Consolidating various purchasing functions into a single marketplace Procure to Pay (P2P) system



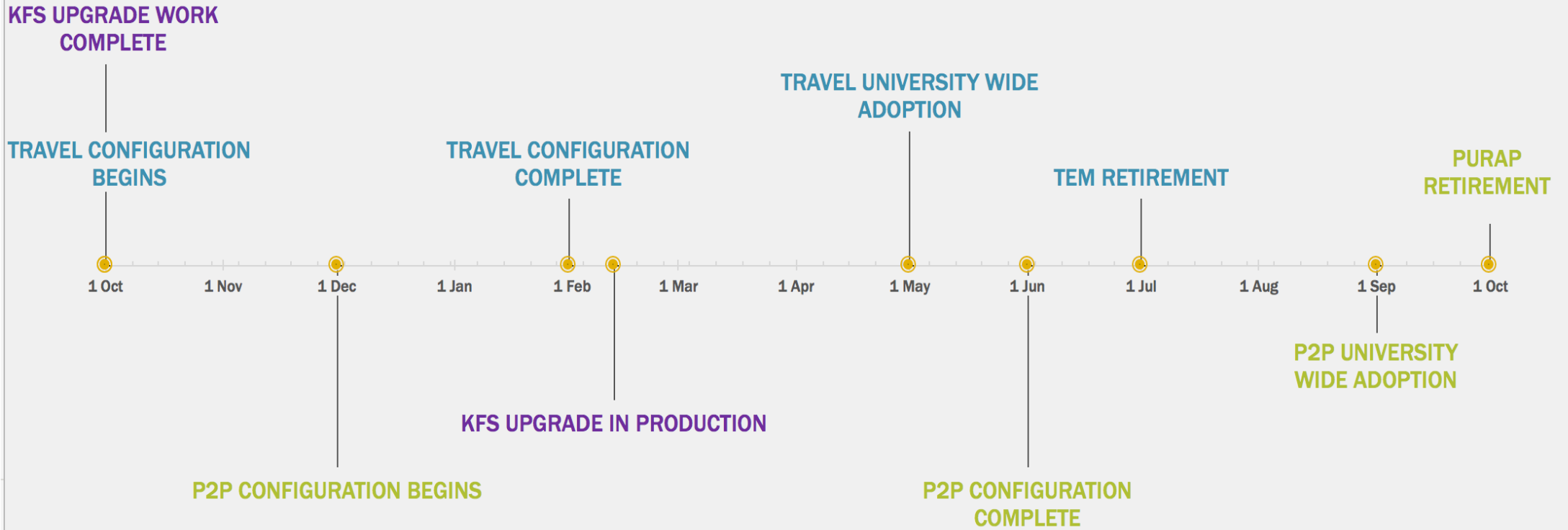
WHY RECHARGE?

recharge: (*verb*) to refresh or restore; revitalize

- Improve user experience
- Streamline policy and procedure
- Increase audit and analytics capability
- Add new tools and automation

2017-2018 TIMELINE

PROJECT RECHARGE TIMELINE





PROJECT STATUS

KFS Upgrade February 12, 2018

- Functional subject matter experts currently testing upgrade.
- Current testing includes existing functionality, new bug fixes, integrations and reporting.

Travel and Expense System Early 2018

- RFP process complete and Chrome River selected.
- Cloud application in which travel and pcard expense reports will be initiated and approved.
- Configuration and integration work underway.

Procure to Pay System Late 2018

- RFP process ongoing. Currently reviewing product demos.

Update as of October, 2018

KFS UPGRADE LOOK & FEEL CHANGES

Accounting Lines hide

Accounting Lines hide detail

From import lines

| | * Chart | Sub-Fund | Org | * Account | Sub-Account | * Object | Sub-Object | Project | Org Ref Id | * Amount | Actions |
|----------------------|------------------|----------|------|-------------------------------|----------------------|-------------------------|----------------------|----------------------|----------------------|----------|---|
| add: | | | | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | 0.00 | <input type="button" value="add"/> |
| Line Description | | | | | | | | | | | |
| <input type="text"/> | | | | | | | | | | | |
| 1 | UA UNIV ADMIN | GENFND | FMOP | 1912610 FMS ADMINISTRATION | <input type="text"/> | 4100 OFFICE SUPPLIES | <input type="text"/> | <input type="text"/> | <input type="text"/> | 50.00 | <input type="button" value="bal inquiry"/> <input type="button" value="refresh"/> <input type="button" value="delete"/> |
| Line Description | | | | | | | | | | | |
| <input type="text"/> | | | | | | | | | | | |

Total: 50.00

To

| | * Chart | Sub-Fund | Org | * Acc |
|----------------------|------------------|----------|------|---------------------------|
| add: | | | | <input type="text"/> |
| Line Description | | | | |
| <input type="text"/> | | | | |
| 1 | UA UNIV ADMIN | GENFND | FMOP | 1912631 FMS CONT GRANT |
| Line Description | | | | |
| <input type="text"/> | | | | |

ACCOUNTING LINES Import Templates

FROM HIDE DETAILS IMPORT LINES

| | * CHART | SUB-FUND | ORG | * ACCOUNT | SUB-ACCOUNT | * OBJECT | SUB-OBJECT | PROJECT | ORG REF ID | * AMOUNT | LINE DESCRIPTION | ACTIONS |
|---|------------------|----------|------|-----------------------------|----------------------|-------------------------|----------------------|----------------------|----------------------|----------|----------------------|---|
| | | | | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | 0.00 | <input type="text"/> | <input type="button" value="+"/> |
| 1 | UA UNIV ADMIN | GENFND | FMOP | 1912610 FMS ADMINISTR... | <input type="text"/> | 4100 OFFICE SUPPLIES | <input type="text"/> | <input type="text"/> | <input type="text"/> | 50.00 | <input type="text"/> | <input type="button" value="bal inquiry"/> <input type="button" value="refresh"/> <input type="button" value="delete"/> |
| | | | | | | | | | | TOTAL: | 50.00 | |

TO HIDE DETAILS IMPORT LINES

| | * CHART | SUB-FUND | ORG | * ACCOUNT | SUB-ACCOUNT | * OBJECT | SUB-OBJECT | PROJECT | ORG REF ID | * AMOUNT | LINE DESCRIPTION | ACTIONS |
|---|------------------|----------|------|----------------------------|----------------------|-------------------------|----------------------|----------------------|----------------------|----------|----------------------|---|
| | | | | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | 0.00 | <input type="text"/> | <input type="button" value="+"/> |
| 1 | UA UNIV ADMIN | GENFND | FMOP | 1912631 FMS CONT GRA... | <input type="text"/> | 4100 OFFICE SUPPLIES | <input type="text"/> | <input type="text"/> | <input type="text"/> | 50.00 | <input type="text"/> | <input type="button" value="bal inquiry"/> <input type="button" value="refresh"/> <input type="button" value="delete"/> |
| | | | | | | | | | | TOTAL: | 50.00 | |

CHROME RIVER SNEAK PEEK

The screenshot displays the Chrome River mobile application interface. At the top, the header includes the Chrome River logo, a navigation menu icon, and user information for "Indiana University". The main content area is titled "Expenses For Indiana University" and shows a specific expense entry for "Trip to Conference". Below this, there is a table with columns for "DATE", "EXPE...", "SPENT", and "PAY ME", along with icons for attachments and alerts. A message prompts the user to "Click '+' to add your first item." To the right, a sidebar menu offers options like "Add Expenses", "E-Wallet", and "E-Receipts". The "Add Expenses" section is expanded, showing a grid of category icons: AIR TRAVEL, GROUND TRANSPORTATION, HOTEL, AIRFARE, BAGGAGE FEE, UPGRADE/CHANGE FEE, AGENT FEE, MEALS, and TRAVEL OTHER. At the bottom, a summary bar shows the "Expense Report" number (010019792698), the "Total Pay Me Amount" (0.00 USD), and a green "Submit" button.

CHROME RIVER + New Indiana University

Expenses For Indiana University

Trip to Conference

0 Comments 0 Attachments

| DATE | EXPE... | SPENT | PAY ME |
|-----------------------------------|---------|-------|--------|
| Click "+" to add your first item. | | | |

Add Expenses

- Create New
- E-Wallet
 - All
 - Offline
 - Recycle Bin
- E-Receipts
 - Receipt Gallery

AIR TRAVEL

- AIRFARE
- BAGGAGE FEE
- UPGRADE/CHANGE FEE
- AGENT FEE

GROUND TRANSPORTATION

HOTEL

MEALS

TRAVEL OTHER

Expense Report: 010019792698

Total Pay Me Amount: **0.00** USD

Submit



STAY INFORMED OF NEW DEVELOPMENTS

Updates on Project Recharge will continue as it progresses

- Soon: Targeted updates to specific audiences
- Updates from us: Meetings and infoshares
- More information, timeline, and continuous updates: uits.iu.edu/projectrecharge