Agenda

• 9:00 – 9:05 – Welcome/Introductions
• 9:05 – 9:35 – Team Builder Activity
• 9:35 – 9:50 – Creating Outlook Rules, Quick Links
• 9:50 – 10:20 – Purpose Code Review (Udataglance)
• 10:20 – 10:30 – Break
• 10:30 – 11:00 – Funding Request Form
• 11:00 – 11:15 – Peer Reviews
• 11:15 – 11:30 – Updates: Concur, Staff Survey, Huron
• 11:30 – 12:00 – Remarks from the Dean
Team Building Activity

- **Goal:** Your team will work together to make the most creative, flat, UD pumpkin (only 1 entry per team/table) using the available supplies at your table.
  - 25 minute time limit
    - First: Write your team name and each individual names on the back of the pumpkin
    - Second: No carving – coloring/gluing/drawing only
    - Third: Keep it work appropriate
    - Fourth: Incorporate UD into your decorating: UD colors, Blue Hen, UD letters, etc.
  - All pumpkins will be displayed in the dean’s office
  - Best UD spirit – Winner selected by the CAS Dean
  - Prizes to be awarded
Creating Outlook Rules/Quick Links

1. Right click on a message in your inbox
2. Select RULES
3. Select CREATE RULE
### Purpose Code Review

#### Financial Summary (Period 4 2019 as of 7am 10/25/2018)

<table>
<thead>
<tr>
<th>Purpose code</th>
<th>Purpose description</th>
<th>Purpose Code Balance</th>
<th>Purpose Code Balance Including Obligations</th>
<th>Project ID</th>
<th>Project PI</th>
<th>Project End date</th>
<th>Award ID</th>
<th>Project Sponsor</th>
<th>Dept ID</th>
<th>UNI DEL End date</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARSCL75117</td>
<td>DEF-ABS MINOR RENOVATIONS</td>
<td>167,384.51</td>
<td>167,384.51</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>02501</td>
<td></td>
</tr>
</tbody>
</table>

**Check All or None**
- ARSCL75117

**Include (O) and (P) codes**
- Off

**View:** Web Statement
Funding Request Form

• How do I access the Funding Request Form?

• When do I use the form vs sending an email?

• How do I know if the form was received?

• Will I get confirmation if the request was approved/rejected?
Peer Reviews

• Provide to Sunaina Soares, HR Manager, AVP Office
  • Candidate Dossier Submission – department choice
  • Department Committee Recommendation – department choice
  • Chair recommendation to Dean – 4/01/2019 – must be this date
Reclassification – Spring Cycle

Submission to Janna Chavis – November 30th
Janna will send to HR for the December 15th deadline

ASKUS meeting
Post Doc Fellows & Post Doc Researchers

The title of "Post Doctoral Fellow" is designed for people who are at the University doing research primarily as independent learners, not on assigned projects as employees; the “Post Doctoral Fellow” designation is akin to an advanced graduate student, and the IRS specifically views post doctoral fellows as non-employees. See link for more information

https://provost.udel.edu/files/2014/12/Admin-Post_Docs-27y5mjt.pdf

Post Doctoral Fellow Statement of Affirmation (see file below) must be submitted to Dee Smith for signature prior to submitting the RTR.
Updates: Concur

• What we know –
  – Augie Maurelli/Greg Oler will attend Dec chair’s meeting
  – Procurement policies that need to be updated as it relates to Concur – going for approval on Nov 9th
  – Aim for official announcement – early Nov with email/video from Alan Brangman
  – Cost Object Approvers (COA) – on hold
  – Travel management info sessions in Nov, Jan & Feb
Please join us for a 30–45 minute demonstration given by World Travel Inc., UD’s new Travel Management Company.

These sessions are being offered so you can learn how to book travel easily and efficiently with World Travel Inc. via Concur, UD’s new travel and expense management tool.

Nov. 13, 2018 • 11:00 am and 1:00 pm • Clayton Hall – Room 101B
Jan. 8, 2019 • 11:00 am and 1:00 pm • Clayton Hall – Room 125
Feb. 13, 2019 • 11:00 am and 1:00 pm • Clayton Hall – Room 125

The content of each session is the same

• Parking is provided
Updates: Staff Survey

• We would like to send out another staff survey to get an updated list of who does what in each department.

• We can have smaller group meetings on specific topics based on job duties.
Updates: Sponsored Programs

• Huron updates
• NUCRA conference – December 5th – 7th
Remarks from the Dean