University Financial Users Group (FUG)

Opening of meeting and initial remarks:

Robin Uttin opened the meeting and welcomed all new attendees:-
Douglas Youngson – UIS
Gideon Coles - Finance
Caroline Rodney – North West Cambridge Development
Matthew Moon – Vet School

Robin advised the group that the MRC Toxicology Unit became part of the University from the 1st March 2018 and is located in Leicester and that the Pensions Administration Section became part of the Finance Division from the 1st March 2018.

To Note
- The next FUG is at the Sainsbury Laboratory, a map will be published with the agenda.

MINUTES

1. Minutes of previous meeting 26th Jan
   - Approved and signed.

2. Actions from previous meeting
   - No actions from previous meeting.

3. North West Cambridge (presentation attached)  Matthew Dawkes
   Phase 1 is due to complete end of 2018. 700 market homes for non-University staff are available, whilst 325 student units have been bought by Girton College. 700 University staff homes are being rented to University staff and staff within affiliated institutions. Calculation for rent is based on 30% of net household income. The development is broken down into lots and currently lot one is nearing completion by the end of the year.
   Phase 2, which is the market square and a further 1000 home (mix of market, student and staff units) will be built as well as additional amenities such as laundrette, hotel, public house, pharmacy. The development is funded via a 40 year loan from the University at 4.25% interest.

   The primary school is due an Ofsted inspection this year and took 15 months to complete the build. The community Centre building has been nominated for some design awards and the Nursery is due to open September 2018. There is no plan for a secondary school and there are no plans to change the junction with the M11.

   The site focuses on being sustainable e.g. central boilers connecting to all accommodation, combined heat and power, which is billed by the University and not from an outside supplier.
4. **Shared Services Update (presentation attached)**  

**Background** – Shared Services within Finance Division now process transactions for 121 out of 142 departments, with the Clinical School Shared Services Team processing for all 35 departments. In December 2017, the Clinical Schools Team transferred into and joined teams with the Shared Services within the Finance Division. A small team remain at the Clinical Schools for filing and post.

**Changes so far** – Questionnaires were sent to departments and staff to provide feedback on Shared Services, which had a very good response rate. The batch naming convention has now changed (not yet adopted in Clinical Schools) and review is being undertaken of processes to look for efficiencies. New expense claim form has been introduced. Whilst some users expressed their satisfaction with the current on-line forms, feedback from users has been positive about the new form.

**Fast Track of Employee expenses** – Fast track employee expenses, new email address for scanned claims, department will retain the paperwork. Guidance will be issued shortly.

**Overall Aims** – To standardise processes and increase efficiencies. Work will be prioritised according to urgency.

To assist with understanding the way the departments work, the Shared Service Team will be split into PODS, initially by School, and will also visit the departments. Benefits of this will be to obtain a greater understanding of how the departments work, understand the local processes and constraints. In addition the Shared Service website is being re-designed, along with the addition of FAQ’s, roles and responsibilities of both Shared Services and the department. All of this is to go LIVE as soon as possible, but with a provisional date of May 2018.

**How can Departments help** – A large volume of queries are of the same nature e.g. PO’s not receipted, coding incorrect, control at the requisition/PO stage would be extremely helpful.

5. **Trade Suppliers Setup (presentation attached)**  

**What’s changing** - Changes are being made to the back office process relating to new and amendment requests for trade suppliers to improve the quality of information. Changes include categorising the supplier with the correct category and key search words and to remove the system default of the X (miscellaneous code).

**Who it affects** - The change will have no impact on the process the departmental users follow as it is solely a behind the scenes process change.

**Supporting Documentation** - To assist with getting things right first time, a training pack and flowchart has been attached to these minutes and will be distributed via the bulletin. This will highlight the process and what documents are required from departments to ensure the process is as smooth and efficient as possible.

Date for the diary: Purchasing Exhibition 2018, Sustainability, will be held at the Double Tree Hilton, Granta Place, Mill Lane on Wednesday 25th April from 12 noon – 4pm.

6. **General Finance Matters (presentation attached)**  

- **Critical and security patching** – this went LIVE on the 5th February and CUFS is now using Java Web Start
- **PO email address** – PO is now populating with the correct email address based on profile set up.
- **Apprenticeship Levy** – Going LIVE in March. This will show as a separate column on GMS staff Costs Report
- **RG numbers** – are running out so the most efficient system solution is to remove the R and the new format will be G123456
• **Year-End dates** – closing of modules in the month of June will be extended to allow for more processing prior to July year-end. Further details will be discussed at the April FUG.

7. **AOB** – Robin would like feedback on the venue.

Any topics that people want to see covered at a future FUG please email Robin.Uttin@admin.cam.ac.uk.

Email for suggestions/feedback that department staff can give directly to the Finance Division can be emailed to the helpdesk hub UFS_HelpdeskHub@admin.cam.ac.uk.

**Dates of next meetings** – held at Todd-Hamied Room, Department of Chemistry starting at 9.30am unless stated otherwise

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<th>2018</th>
<th>Notes</th>
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<td>Friday 20(^{th}) April</td>
<td>Sainsbury Laboratory</td>
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<tr>
<td>Wednesday 6(^{th}) June</td>
<td>Clifford Allbutt Lecture Theatre, Addenbrooke’s</td>
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<td>Friday 13(^{th}) July</td>
<td>Followed by year end seminar</td>
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<td>Wednesday 19(^{th}) September</td>
<td>Isaac Newton Institute for Mathematical Sciences</td>
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<td>Friday 2(^{nd}) November</td>
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<td>Wednesday 12(^{th}) December</td>
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**Presentations:**

The following presentations cover items 3, 4, 5 and 6

- NORTH WEST CAMBRIDGE DEVELOPMENT - FUG.pptx
- FUG Presentation 09.03.18.pptx
- Trade suppliers set up FUG v3.pptx

**Attendees**

- Robin Uttin - Finance Division
- Matt Dawkes - NWCD
- Stephen Kent Taylor - Finance
- Bernadette Parson - Finance
- Helen Wain - Finance Division
- Elaine Dalton - Botanic Garden
- Tracy Levitt - Finance Division
- Vladka Mikulski - Finance Division
- Julia Nicholson - INI
- Stephanie Clare - Sports Service
- Tina Lapthorne - Physics
- Andrew Weatherley - Finance Division
- Ana Fabrega Fernandez - Finance Division
- Judy Law - Finance Division
Samantha Smith Archaeology
Dorothee Amour Staff Bureau
Becky Darlow Finance Division
Helen Maffin Finance Division
Mike Sinclair Finance Division
Bonnie McCull Finance Division
Katie Butler Finance Division
Sam Thake Finance Division
Luke Bovill Finance Division
Omar Kaikati Finance Division
Craig Langton Economics
Victoria White MRC – CBU
Joel Brand School of Physical Sciences
Matt Burgess School of Clinical Medicine
Abdul Khalique School of Arts and Humanities
Deana Robinson School of Humanities and Social Science
Gideon Coles Finance Division
Helen Wain Finance Division
Sophie Stock Bioresource
Mike Webster Haematology
Matt McAusland Medicine
Matt Moon Vet School
Andy Measoa MRC Cancer
Sidney Ho Economics
David Savidge Astronomy
Irina James MRC – MBU
Faith Durup DPMMMS
Sue Leatherbarrow Astronomy
Farhana Ghelani Investment Office
Taryn Miller Public Health Primary Care
Camila Hernandez office of Post doc Affairs
Susie Chan Office of Post Doc Affairs
Anna Stapien NWCD
Caroline Rodney NWCD
Jane Course Gurdon Institute
Michanne Haynes-Prempeh Research Operations Office
Jill Bullman Finance Division
Annie Baxter CRUK Cambridge Institute
Anne Waldock Engineering
Murray Papworth Engineering
Kylie Birch Vet School
Gina Arnold Vet School
Niall Taylor Physics
Andrew Rose UIS
Simon Irvin UIS
Douglas Youngson UIS
Yanying Chen MRC BSU
Maria Pearman Scott Polar Research
Andria Laws
Ben Green
Claire Thrower
Rebecca Stamford
Chris Patten

Hamilton Kerr
Chemical Engineering
Material Science
Material Science
Finance Division

Apologies
David Hughes
Joseph Worth
Elaine Mortimer