

Business Process Advisory Group – August 14, 2009 – INSCC Room 110

Attending:

Angela Brown, College of Science	Ann Blanchard, Undergraduate Studies
Bobbie Harris, College Of Engineering	Bruce Neumann, Development Office
Carl Larson, FBS	Cynthia Garcia, Central SVCS
Dave Bardsley, College Of Pharmacy	Dean Church, FBS
Doug Kenner, ACS	Erica Adamson, Scientific Computing
Ethan Hacker, KUEN	Fredric Hon, College of Humanities
Gary Gledhill, Grants & Contracts Accounting	Jeff Johnson, FBS
Jeremy Uffens, ACS	Jessica Stokes, ACS
Jim Urry, ACS	John Downing, FBS
Karineh Hovsepian, College of Fine Arts	Kevon Balls, ACS
Kiriaki Pentari, Accounts Payable	Laura Marks, College Of Engineering
Leatha Allred, Chemistry	Leslie Bigler, College of Mines & Earth Sciences
Margaret Tennant, USTAR	Margo Bonnette, College of Health
Marilyn Burton, Neurobiology	Marilyn Cox, Social & Behav Science
Mark Winter, Budget and Analysis	Marv Hawkins, ACS
Nola Lucke, FBS	Pam Mollner, Internal Audit
Perry Hull, Central SVCS	Rebecca Baggett, FIS
Sandy Gunderson, FBS	Sandy Hughes, Budget and Analysis
Sheralyn Stevens, KUEN	Steve Allen, FBS
Utahna Miller, School Of Business	Virginia Beane, College of Law
Wanda Penovich, School of Medicine	

Last Meeting Follow-up

No follow up items from last meeting.

*** Not mentioned in the meeting, but the FY10 BPAG Calendar is available (<http://fbs.admin.utah.edu/download/bpag/BPAG10.pdf>). Please review and report any mistakes or suggestions ASAP. Thanks!

Portfolio Project Review

The process for reviewing Portfolio Projects was demonstrated.

ARRA

ARRA (American Recovery Reinvestment Act) was discussed. The money comes from the State as a supplement and also from the Federal Government through awards from different federal agencies. The University is required to report how this money is spent. This has added additional reporting mainly at the central administration level. The first report is due October 10, 2009. This Portfolio Project is to meet this deadline.

WEB Journal Entry (Demo)

A demonstration of the new WEB Journal Entry user interface was given. WEB Journal Entry includes:

- Main page
 - Listing all journals in process
 - Journals that need to be approved
- Journal Entry Page
 - Top section for inputting information about the journal
 - Twenty journal lines (default, lines can be added)
 - Ability to convert to a template (future release). For right now use Excel as a means to save a template.
 - Ability to show errors
 - Running total of debits and credits
 - Ability to view specific lines
 - Chartfield validation rules will be applied
 - Journal validation rules will be applied.
 - Once submitted, the preparer cannot edit the journal, but an approver can recycle it (return it to the preparer for editing).
 - Ability to share journal

The approval process was discussed. No business rules will change in the approval process. It was suggested that “recurring journal entries” be considered for future versions.

FS System Upgrade

The FS System upgrade will be started in a couple of weeks. During the upgrade, changes to FS will not be made unless they are production related.

Chartfield Self Service Update

The Chartfield Self Service Update is in the design and prototype phase. It *may* be done before the upgrade starts. The first phase will include ability to change locations and liaisons.

Electronic W-2

Payroll reporters were reminded about notifying their employees about the ability to select to receive the W-2 electronically. The W-2 is also available year round back to 2001.

F/HRIL Update

The “Employee Contract Data” F/HRIL was demonstrated. Other F/HRIL’s will be coming out soon. The ‘Help’ documents for the F/HRIL’s are also being improved.

Maintenance of Signature Cards

A discussion of maintaining signature cards was held. Points included:

- Submitting changes (adds/deletes) without submitting a new card for the whole group each time.
- See who currently has signatory rights to an Activity or Project.
- Conflict of Interest disclosures check box.
- Conflict when a PI/Account Executive changes.

Open Discussion

Brief discussions on:

- DJOBS – Limit the distribution to only the current Fiscal Year
- Cannot change distribution on a “contract job”

Next BPAG meeting – September 11, 2009