Business Process Advisory Group – December 12, 2008 – INSCC Building, room 110

Attending:

Angela Brown, College of Science

Ann Blanchard, Undergraduate Studies

Bruce Neuman, Development

Carl Larson, FIS

Cynthia Garcia, Data Systems

Dean Church, FIS

Doug Kenner, ACS

Erica Adamson, Scientific Computing

Fredric Hon, College of Humanities

Gary Gledhill, Grants & Contracts Accounting

John Downing, Accounts Payable

Karineh Hovsepian, College of Fine Arts

Laura Howat, FBS

Leatha Allred, Chemistry

Leslie Bigler, College of Mines & Earth Sciences

Margaret Tennant, USTAR

Marilyn Burton, Neurobiology

Marv Hawkins, ACS

Matt Hunter, Biology

Nola Lucke, FBS

Perry Hull, Plant Operations

Rebecca Baggett, FIS

Sandy Gunderson, Purchasing

Sandy Hughes, Budget and Analysis

Steve Allen, General Accounting

Theresa Ashman, FBS

Todd Kapos, FBS

Wanda Penovich, School of Medicine

Optimizing Resources in Tough Economic Times

It was explained that projects in the future will be more scrutinized by how much value the University receives. FBS moving toward paperless does not mean that the other areas need to print more. Several of our initiatives will look for ways to make printing optional rather than required.   One such example is printing of Journal Entries. This is explained in a recent news post.

Transparency Board Update

An update was given on the progress of the Transparency Board. A website has been created with information. This website will be updated as needed. Links on the website allow the user to ask questions and request presentations of the transparency information. The website will be made public after it is approved the U Transparency Steering Committee.

Who is BPAG

The purpose of BPAG is to share ideas and to address concerns – we are not a policy-making group. This memo was sent out on Feb 13, 2004 stating the purpose of BPAG. The minutes from a BPAG meeting held February 4, 2005, under the heading, Components of Communication, explain further the reason we communicate.

New Plant Ops Billing System (FMAX)

A presentation and demonstration about the New Plant Ops Billing System (FMAX) was given. FMAX makes it possible to submit an online work request. This new system interacts with the Financial System. Discussion was held on account code selection when filling out the form.

Procure-to-Pay Lifecycle

A discussion was held on how and when vouchers are paid. [These screenshots](#) demonstrate how vouchers move through the system. Accounts Payable reviews and seeks approval from buying departments for all Purchase Order invoices over $3000. A request was made to communicate information about these transactions to the responsible financial contact.   This process is currently under review by FBS and these concerns will be added to the agenda.

IOGC Update

The Web Application that displays the hierarchical Org chart was demonstrated. A website is being created for the IOGC. IOGC means Institutional Org Governance Committee.

WEB Payroll Encumbrance Report Issue

In cases where an employee has multiple payroll distribution rows that go against the same Chartfields, the employee's total Remaining Encumbrance in those Chartfields is returned once for each distribution row, and hence erroneously included multiple times in the sum total of remaining encumbrances on the account…resulting in an overstated Remaining Encumbrance total at the bottom of the encumbrance explosion (Payroll Encumbrance Summary) report. This issue is being addressed.

WEB Journal Entry

WEB Journal Entry has moved up the priority list because of the potential for cost savings and efficiencies. Volunteers to participate in a focus group are needed. Frequent follow-up with BPAG will also happen.

E-Signoff of Management Reports

Another cost savings measure being investigated by FBS is electronic statement and the "E-Signoff" of these reports. Currently, the scope of Management Reports is: Monthly Accounting statements, semi-monthly Earnings and Benefits statements, and monthly P-Card Statements. Focus Groups and BPAG will be used to define the requirements for E-Signoff and Electronic Statements. Reconciliation and annotation of journal details are two of the more common reasons these reports are printed.

FBS Communications

New functionality in the FBS website to report and track network issues with Financial Web applications was demonstrated. New "Feedback" and "Ask Us" pages were also demonstrated.

Open Discussion

Discussion of dynamic sorting for Chartfield Lookups and Journal Detail Search is under development. It was requested to also look at the sort order in the PCard Reallocation system.

Next BPAG Meeting – January 9, 2009