Business Process Advisory Group—January 11, 2013—110 INSCC

Attending:

Angela Sullivan, CFA
Carl Larson, FBS
Darrin Robertson, FBS
Jennifer Long-Pratt, FBS
John Levandowski, USS
Linda Reed, HG
Marjorie Goodrich, IA
Nora Ishihara, KUED
Runar Boman, CS
Sandy Hughes, BUD
Susan Wolfe, ARCH

Bryan Harman, USS
Carol Hsieh, FBS
Dean Church, FBS
Jeremy Uffens, USS
Kami McCneil, SOM
Margo Bonnette, COH
Marv Hawkins, USS
Patricia O'Kane , SOM
Rebecca Baggett, FBS
Steve Allen, FBS
Utana Miller, DESB

Management Reports, PDF discussion

A discussion was led about the new functions in the Management Reports. Topics included issues that have been resolved or are in process; PDF functionality; review options; and a reminder that the red, blue, and green text have links and hovers. It is recommended to download Adobe Reader 11, because it has a lot of the same features that Adobe Pro has.

Evidence of Review (EOR) discussion

When using EOR, be sure to put a name in (last name first, or use emplid) to be able to check the dates, and then click the Run button. Just like in the Management Reports, there are links and hovers behind the colored text. You can tell if an EOR has been done because it will show next to the project. There are also reports in the Financial Information Library (in the EOR folder) that show what has been reviewed:
- EOR Reviewer—shows what has been reviewed by Reviewer or Account Executive
- EOR Reviewer by Dept—shows what has not been done. Also has Org rollup functionality.

Attendees said that they wanted to continue to receive direct email notification that the month has closed, in addition to the FBS News emails.

Project Status discussion

The five Project Statuses are:
- Prior to Open—distributions for encumbrances can be set up
- Open
- Ended—no new spending can occur. This status is usually for 60-90 days
- Closed—no more transactions can occur. The PDF bundle can still be run
- Final—cannot run PDF bundle at this phase, but the individual PDF still works

Additional topics

- The F&A Encumbrance for December 2012 will always have the wrong amount. The correction was applied in the month of January 2013.
- "Pain Points"
    - There is a need to have an easier way to get information about Pcard reallocations, to see the documentation.
    - It would be nice if signature cards were easier to manage.

Next BPAG meeting—February 8, 2013