

## **Business Process Advisory Group**

**June 8, 2007**

**Winder Board Room**

### **Attending:**

Amy Beecher, Mgmt Accounting & Analysis

Ann Blanchard, Undergraduate Studies

Bobbie Harris, College of Engineering

Carol Jost, Marriott Library

Dave Bardsley, College of Pharmacy

Dean Church, FIS

Fredric Hon, College of Humanities

Greg Hughes, Human Resources

Jim Urry, ACS

Kori Dehaan, Travel

Leslie Bigler, College of Mines & Earth Sciences

Margo Bonnette, College of Health

Marilyn Cox, College of Social & Behavioral Science

Nora Karst, KUED

Sandy Hughes, Budget

Stephanie Nuttall, College of Math

Angela Brown, College of Science

Bob Turner, Human Genetics

Bruce Neumann, Development

Catherine Coda, College of Nursing

David Beckstrom, Mgmt Accounting & Analysis

Dennis Oyler, School of Medicine

Gary Gledhill, Grants & Contracts Accounting

Jackie Byrd, College of Education

John Levandowski, FIS

Laura Howat, Tax Services

Margaret Tennant, College of Business

Marilyn Burton, Neurobiology

Matt Hunter, Biology

Roberta McCormick, Physics

Shari Zinik, Chemistry

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### **Last Meeting Follow-up**

None

### **March AVP Small Dollar Purchase Memo**

The group agreed that communicating this memo via FBS News was an effective way to get this memo distributed.

### **BRASS Update**

BRASS was loaded to the HR system successfully with limited exceptions. The exceptions will be dispositioned.

### **FYSC Update**

FYSC information will be loaded to the HR system on a nightly basis as final reports are received in human resources. FYSC opened for departmental entry at 8am this morning.

### **Online Position Requisition**

Human Resources has a new online form for position requisitions. The use of this form will be communicated by Human Resources. Departments would like to have the system optionally enforce the Dean/Director/VP level approval on a per department basis.

### **Management Report Reconciliation/Shadow Systems**

A discussion was held to elicit the reasons departments have developed shadow systems (access, quickbooks, excel, filemaker, etc.) for financial reporting. Departments are using these systems for:

- Additional level of encumbrance reporting
- Faster tracking of expenses in process (CQs, LOs, COs, etc.)
- Encumbrances beyond fiscal year boundaries
- Descriptions of transactions (what item was purchased, etc.)
- Easier reconciliation to the management report
- Categorizing expenses by type (events, classes, committees, programs, etc.)
- Future revenue sources (proposals, etc.)

E-mails can be sent to Dean Church or John Levandowski to indicate additional uses of shadow systems not listed above.

Departments would like the option to be able to encumber charges in PeopleSoft via a self-service application.

### **FY 07 Review/FY 08 Focus**

A presentation was given on the successes of the past fiscal year and some areas of focus for next fiscal year.

Some of the successes from the last fiscal year are:

- D-JOBS “Ending Distributions” button – June 2006
- Journal Detail Search for ALL Activities/Projects in an OrgID (including roll-up) – August 2006
- Success launch of the Financial Information Library (FIL) – September 2006
- WEB-Based Departmental Deposit Application – October 2006
- WEB Check/Advice Roster (including Org Roll-up) – January 2007
- Management Report/WEB EBT Security by Fund within OrgID – January 2007
- Direct Deposit of Recurring Scholarship/Fellowship payments – January 2007
- Employee Self-Service W2 reprint – January 2007
- Departmental Deposit Chartfield templates – March 2007
- Verify Other Paycheck(s) – March 2007
- Verify future termination of summer pay jobs
  - Available in D-Jobs from day one
  - Available in FYSC – June 2007

### **Items that BPAG would like focus on in FY 08 are:**

- Campus Budget system (C-BOB), which replaces BRASS and maybe FYSC
- Departmental Journal Entry
- Electronic Statements
- Electronic Approval (workflow)
- Multiple concurrent jobs for hourly employees in Kronos
- Electronic Pan Forms (SWB, etc.)
- E-manager security for multiple users per dept
- W2s available for prior years electronically
- Continued Training
- Freeze projects to enforce end dates
- Physically locate the central administration (ie all in one place like the Park Building)
- Ability to view PAN forms based on DISTRIBUTION OrgID (added from email received on 6/12/2007)
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### **Open Discussion**

A memo on PI/Key Personnel changes and effort changes was distributed. This memo will also be distributed as a stuffer in project management reports

A flyer on endowments training was distributed. The training will be Sept 5, 2007 at 2pm-4pm in 2600 HSEB. For more information contact Theresa Ashman.

A concern was re-iterated that the group strongly feels that Human Resources needs to have a consistent representation at the BPAG meetings.

*The next Business Process Advisory Group meeting will be*

*July 13, 2007, 9-11:00am, Winder Board Room*

*Jenny Fickett: Phone: 581-5975*