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

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
- Direct Deposit of Recurring Scholarship/Fellowship payments – 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)

**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.

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**The next Business Process Advisory Group meeting will be**

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

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