
Attending:

Ann Blanchard, Undergraduate Studies  Bobbie Harris, College Of Engineering
Bruce Neumann, Development Office  Bryan Harman, ACS
Carl Larson, FBS  Dave Bardsley, College Of Pharmacy
Dean Church, FBS  Doug Kenner, ACS
Fredric Hon, College of Humanities  Gary Gledhill, FBS
Jeremy Uffens, ACS  Jessica Stokes, ACS
Jim Urry, ACS  John Downing, FBS
Kori DeHaan, FBS  Leslie Bigler, College of Mines & Earth Sciences
Magali Coburn, Scientific Computing  Margo Bonnette, College of Health
Margaret Tennant, USTAR  Marilyn Burton, Neurobiology
Marv Hawkins, ACS  Nola Lucke, FBS
Rebecca Baggett, FBS  Sandra Bruhn, College Of Engineering
Sandy Gunderson, FBS  Shari Zunik, Chemistry
Sheralyn Stevens, UEN/KUED  Steve Allen, FBS
Tami Garff, Academic Affairs  Todd Kapos, FBS
Utahna Miller, School Of Business  Wanda Penovich, School of Medicine

Last Meeting Follow-up

Some cleanup has been done on the Chartfields in the PCard Reallocation drop down box. A massive cleanup will be completed in the next couple of weeks. An ongoing effort will be made to keep valid Chartfields in the PCard Reallocation drop down box.

Improvements to FBS Communication

- FBS Newsletter – Financial & Business Services will be launching a quarterly newsletter starting the beginning of next quarter. Input about the newsletter and future content are encouraged from BPAG. BPAG members are encouraged to share the newsletter with their associates. The Newsletter will have the following sections:
  - Notable changes – Changes that have occurred will be communicated in this section.
  - Process Spotlight – This section will contain pointers on better ways to do our jobs
  - FBS Community – This section will spotlight someone in FBS who is excelling at their job.
  - Internal Controls Center – Processes that we should be using will be highlighted here.
  - $Y$ Happenings – This section will report on new technology related processes that have been or will be implemented in the system.
  - Upcoming Events - This section will list upcoming events
• Share Your Ideas icon – This icon links to a page so that the reader can share their ideas about the newsletter.

• Help – A link to “Help” was added to the Gold Bar of the FBS website. This section of pages provides help to the FBS web applications in the Campus Information System. This can be used as a reference to the FBS web applications as well as a training tool.

• Index - A link to “Index” was added to the Gold Bar of the FBS website. The Index is a “Wikipedia” of all things FBS. The Index and Help page link to each other to create an extensive resource for clientele of Financial & Business Services. Over 200 subjects are in the Index. Each of the subjects may include:
  o Definitions
  o Discussions
  o FBS tips
  o Procedural Forms and Instructions
  o Ask Us Web Forms
  o Other useful links
  o Share Your Ideas links on every page to encourage input from users.

**FBS Initiatives – Status Update**

• **UPlanIT** – The UPlanIT Executive Dashboard was demonstrated. BPAG members were encouraged to use the dashboard to find updates on projects they are interested in.

• Paperless W2 forms – Upcoming is the ability to elect to receive the W2 form electronically.

• Self Service Chartfield Update – The ability for departments to update certain Chartfields electronically, without submitting the change to central administration is being developed.

• Web Journal Entry – Journal Entries will soon be able to be submitted electronically.
  o An interactive discussion and presentation was held about how Journal Entries are created, including approvals, documentation, business requirements and the life of a Journal Entry. Advantages of electronic Journal Entries include:
    ▪ eliminating dual data entry.
    ▪ allowing for import from excel.
    ▪ allowing for templates.
    ▪ improving edits throughout the lifecycle.
    ▪ assuring only authorized persons can prepare them.
  o The Web Interface which is being developed was demonstrated. Features of the Interface include:
    ▪ Journal Information including:
      • Journal ID
• Accounting Date
• Source
• Requestor and Preparer information

- Backup Documentation
  • Retained in Department
  • Backup Enroute
  • Attached Electronically

- Template – the ability to store a Journal Entry as a template for later use.

- Approvals – The ability to add departmental approvers. The system will send to the appropriate Central Administration approver based on the content (Chartfields) of the Journal.

- Tracking – The ability to view where in the process the Journal is.

**Open Discussion**

No open discussion.

Next BPAG Meeting – July 10, 2009