UShop Survey

The UShop team completed a survey of UShop users recently. Perry Hull presented the findings. He compared 2019 to 2020. Click here for the presentation. Contact the UShop Team with any questions.

Chart of Accounts

The University will be embarking on a three to five year project to update the Chart of Accounts. In the last 23 years that the University has been on PeopleSoft, many upgrades and updates have been done, but the Chart of Accounts has stayed the same. Many departments have shadow systems because of the current reporting system does not meet their needs. The first part of the project will involve meeting with departments to learn their needs with regard to a Chart of Account.

Benefits of the new Chart of Accounts will be:
- Consistency between Business Units
- Better Reporting
- Reduction in dependence on Shadow systems (centrally and in the departments)

Contact BASS with any questions or if you wish to participate.

RF Track implementation

Property Accounting will be implementing RFTrack software to track Assets. Details of the implementation can be found here. Contact Property Accounting with any questions.

Travel updates

The travel industry is going through tough times with the COVID-19 virus epidemic. Kori discussed what is going on in today’s world. Click here for the presentation which includes:

- Restrictions/Travel industry Outlook
- Legacy System Shut Down
- Individual and Departmental Travel Cards
- Guest Travel – Options

Contact Kori Wetsel or Darrin Robertson with any questions.
ePR updates

“Rule 3-010A reads: “Reimbursements in excess of the established maximum, currently $1,000, require two approvals – the person's supervisor and the director or department chair, along with an explanation of why preferred procurement methods were not used” ePR will now be enforcing this. More details can be found on page 11 and 12 of the Travel presentation. Contact Maria Nielsen with any questions.

Income Accounting Manager

Todd Kapos, Interim Controller, Financial and Business Services, sent this email to FBS employees on July 6, 2020: “On behalf of the University Administration I would like to congratulate Lisa Zaelit, Associate Director for Financial and Business Services Income Accounting and Student Loans, on her retirement after 45 years of service to the University. Throughout her career at the U, Lisa witnessed the evolution of registering for classes and paying tuition from a largely manual paper-based system to our present on-line and credit card system. Lisa has also been instrumental in setting up credit card processing on campus according to PCI compliance guidelines. Lisa has provided incredible customer service as well as helping many students over the years. We will miss her professionalism and leadership. Lisa’s last day will be September 30th. Please join me in congratulating Lisa on her retirement!”

Steffany Forrest has been hired to replace Lisa. Steffany has been a key member of Income Accounting for many years. Please congratulate Steffany in her new position. This has created a Manager opening in Income Accounting. Click here for more details.

Departmental Deposit

The departmental deposit application is being upgraded. The ability to add attachments is one of the new features. This will make it so non-cash deposits can be done totally online.

Next BPAG Meeting – November 13, 2020