August 15, 2019

Thanks for your time today and for the good discussion.  Just want to summarize a few announcements and outcomes from the CUIBO meeting today.  I have highlighted action item requests.  Anyone, please feel free to add anything critical that I may have missed.  I’m pretty good at summarizing my own talking points, but not necessarily those of others. :/

* Mobile point of sale (POS) devices will soon be available for departments to check out from General Accounting.  More details to follow.
	+ REQUEST:  Please send gnrlacctg@uidaho.edu information about how often your college or division may be interested in checking out a POS device to assist with taking credit card payments for events.  Please include the dates (as specific as possible) as well, so that we can assess demand.  Also, if any departments within your college/division have an interest in purchasing a device, please let them know.
* Expense codes:  We encourage a refresher with your units on the proper use of codes.  We are considering a “training” with the FIG group this year.
* Chrome River:
	+ We are awaiting implementation of the revision to the feed into Banner which will replace the content of the description line in Banner for non-travel claims (p-card and reimbursements).  The description field currently is populated with the CR tile name and will now populate with the first 35 characters of the line item description in CR.  We will notify CUIBO and FIG when this is implemented.
		- REQUEST:  Please decide what is most important to your college/unit/department to show in the Banner description field and train your employees accordingly to populate the description field appropriately.
	+ We recognize that there is some debate about whether or not the Vendor name should appear in the description field or not. Given the split opinions on that, the pending solution described above will provide the most flexibility for units to use as best needed for them.  Keep in mind that the Chrome River Analytics reports will provide the vendor name for these transactions.
	+ We will request that the line item description field in Chrome River for the non-travel expense tiles be changed from “optional” to “required” in order to assist with getting users to complete the field.  We can require that it be completed, but the units will need to train their users on what content to enter into the field.
	+ Analytics reports:  These will soon be available to all CR users.  We need input from users in order to create useful reports.  Ron would like to convene a focus group for this.  We plan to schedule a demo of Analytics at the Sep 12th CUIBO meeting.
		- REQUEST:  Please send names of volunteers for the focus group to rontown@uidaho.edu by Monday Aug 19th.
* Banner Chart V unused values:  Ron will contact fiscal officers about Fund and/or ACTV codes that were set up in Chart V but have not been used.  We would like to delete unneeded values and free up those codes to be used for new assignments.  But we don’t want to delete values that are needed.
* Budget Office:
	+ Trina shared some information about how cost-share transactions are posted to Banner.
	+ Cheyenne has requested indexes from fiscal officers in order to complete some of the fund carryforwards.  If you have a request pending, please send responses to Cheyenne as soon as possible.
	+ Trina shared some options related to how summer tuition revenue posts and is looking for feedback from fiscal officers.  If this topic is relevant to you and you were not able to participate in the meeting today, please contact Trina for more information.
* In response to the question about future system implementations, Derek Johnson reminded the group that a Banner self-service (VandalWeb) upgrade is in the works.  Timetable is not yet available.

Best wishes for the last few days of summer and a successful kick-off to the new academic year!

**REMINDER:  Next CUIBO meeting is on September 12th 9-11am in the Panorama Room of the Idaho Commons (soon to be known as Student Union Building).**

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