Minutes for GUS Executive Committee Meeting
November 17, 2006

In attendance: Allen Matlick, Nancy Fraser, Giulia Brofferio, Robin Jenneve, Maureen Evans, Kathy Scheidemen, Leslie Edgerton, Pete Peterson

Absent: Tim Schmidt

Maureen introduced Pete Peterson, our new 50% CNT II. Pete says things are going well, and he finds the work interesting. Allen reported that Pete is learning 4D by reviewing manuals and Mark’s training materials. Since we don’t have funds for training, we’re hoping that he won’t need to take a 4D class. This is his first time on a Mac. At this point, Pete left the meeting.

We approved the minutes from our last meeting.

We reviewed Allen’s activity report. Nancy had a question about the need for Allen to delete duplicate entries for users. The reason is auditability – the transaction could have been cancelled, but it would still show in the record. When a user wants the information eliminated, Allen must delete the entry.

Refreshing data from screen to screen in the Personnel module is labor intensive. Maureen (along with everyone else who uses the module) wants it to refresh automatically and eliminate the necessity for manual calculations. There seems to be a disconnect between personnel and budget data. A bug in the module has been identified and fixed temporarily.

Regarding servers:
Had to move Sociology to upgrade the version of GUS they were using
GISP is on a separate server – Allen is hosting
ISBER is on their own server in their department

Maureen praised the recent Personnel training. The presentation was well organized and timely. Mark did a very professional job. There was good dialog, questions and feedback. The session lasted longer than anticipated. There are plans to put the powerpoint presentation on the web.

What should the next training be? There have been requests for Auto-Reconcile training. ECE is trying it for the first time this month – Allen offered to come over to assist when they do it. Perhaps Purchasing training next. Or Budget Module training for new users. It’s hard to make sure those who need it will come to training.

Documentation project might help with these issues. Sara is beginning to work – she’s sitting with users (i.e., MRL auto-reconcile). Physics offered for her to watch them on project set-up. Deb Owens is a good contact in MSI for extramural projects. Laurie
Eusey in MSI is recommended for fiscal projects. There is so much flexibility there is no standard way people use GUS (i.e., when to choose fiscal projects). This is one of the challenges Sara faces as she prepares documentation. Maureen asked for feedback on what we want documented and how it should look. There is a lot on the website already. Ideas thrown around the table: Table of Contents; Setting Up; standard formats; fill in the gaps; detailed descriptions; project checklists; short-hand cheat sheets; basic vs. detailed vs. cheat sheet; concepts with details about how information feeds into other modules (information flow); basic diagrams; a “what NOT to do” document. Mark wants to change the flash screen, looking for enhanced functionality and access to modules and diagrams.

Suggestion: take a look at cybersource.com. This is credit card user vendor, and they have a great manual with diagrams.

Allen gave a demonstration of the reports for email delivery. There is no pattern for how PIs want to see reports. However, they all want summary reports. The new reports screen looks similar to the old, and contains additional buttons for the new reports and more help buttons. There are two new reports, with plans to add a “payroll projections” report. Allen has simplified the code for maintainability and to generate different versions of the reports. The existing reports have changed a bit (i.e., notes section) for more flexibility that users can set from preferences.

To serve reports up on the web, you can save to a disc to create a subfolder that contains PIs reports. You can select a consecutive range of PIs. This works for automatic reports for each PI depending on your set-up for each. It also gives you electronic versions of the reports you send out. This only works on a Mac now. If you have a PC, additional software is needed for 4D to create PDF’s. Get a clunker Mac to create reports. Giulia offered up clunkers. And she won’t take them back. Ever.

You can also produce reports by project code in a different format. It saves to your desktop and you can move it wherever you want.

For reports by PI, report name is 1st 6 digits of their name and a unique PI identifier #.

For reports by project code, report name is project code and date.

Email report: you select options depending on whether PI wants printed or email report. If they want email report, generates email with reports attached. Can set up canned messages and GUS fills in specific words. There is lots of flexibility in emails. Basics are canned and you can add key words, disclaimers, etc. You can edit for individuals. On a Mac, you can click on which reports to append.

Everyone agreed that Allen has made tremendous progress on the reports, and since it is so complex, we need documentation and training. There are some delivery issues, especially with the Web reports. Each department would have to figure out web access/security/passwords. Emails too have concerns, especially at user and report
selection. In order for us to test, we requested rudimentary instructions. Allen will do a couple of small fixes and get it to testers with instructions.

Other projects Allen has in the pipeline:

1. He wants to get back to the Purchasing module. Needs to rewrite PO input screen. Work behind the scenes on vendor blankets, fabrication and address book has been done. Need a group of users (to include MSI) to set direction like we did on the Personnel module. Allen would like to put out prototype to show group members what has been done based on input from another group 2 years ago. Allen prefers to do some more work, send it out for testing, iterate, test, iterate, etc. Then demonstrate for users and get input for final product. Projected date of completion: end of January to be ready for testing.

2. Assisted reconcile. Requests have been made to post items directly from GLO to GUS. We could set it up to post specific items, or the whole ledger. Physics is interested in the whole GLO, and we discussed the issue of how to input into specific projects. To save staff time, would have to adapt the list of projects and account/funds to show which are being reconciled/have been reconciled. Projected date of completion: easy fix for specific items so could squeeze in between other projects.

3. Carry-forward wizard. Allen envisions a single screen to help departments solve what has been an ongoing problem since we only do this once a year. This will let GUS do the work. Check some boxes, make some decisions, set up a new year and voila! Projected completion with training: May 2007.

Pete is in the middle of his 6-month learning curve, and may learn faster. He is learning 4D, GUS, business processes. His projects:
   1. Bug reporting database: upgrade the web system
   2. Direct connectivity between GUS databases and other databases, i.e., Data Warehouse. This will help with double entry, especially with the Personnel module once that is working well.

Allen and Mark are on Kuali workgroups as appropriate.

Meeting lasted longer than scheduled and everyone stayed except Nancy who bolted for another engagement.

Adjourned at 11:30.