CUIBO Notes – June 14, 2018

Chart of Accounts

Overall people seem satisfied with the COA training. Still a couple of units that have not been through the training, but all are scheduled – except for the Foundation, which will be scheduled before the end of June. There will be a clean-up session on Tuesday 6/19 2-4:30pm at College of Ed Rm 341 (Doceo Center) for those who may have team members who missed their unit training. Please contact Tyler Thompson (tylert@uidaho.edu) in order to reserve a seat.

The Finance team will record a Chart V training session which will be available for viewing by new staff hired after face-to-face trainings end.   We suggest that new finance staff take the required Banner trainings in order to get the access they need. Then review the recorded Chart of Accounts training to overlay information on the Chart changes. This will need to suffice until we revise the online Banner training around the time Banner 9 upgrade rolls out in Fall 2018.

Reporting is still under development.   There are some reports in Argos in the Test/Chart Project directory that will be moved to the Departmental Financial Reporting under Production soon.   Still taking suggestions to improve the reports available.

Please remember that interdepartmental transactions for fiscal year 19 cannot be entered until after the close of FY 18 period 12 currently scheduled for June 12.

FY19 Reappointment Process

Please see the handouts attached to the agenda presented by Jill Robertson and Dan Noble.

Discussion about future CUIBO meetings

How can this monthly meeting be more valuable for the members? It would be great to incorporate more peer-to-peer learning in this time. It is your meeting. While Finance has information to share, we should also use this time to help each other be successful. Some ideas:

- Tip of the Month: Ask attendees to step and a share a technique or strategy that has helped them manage their work better or to be more effective in their work. Examples: Argos reporting tips, Excel tips, Outlook tips and tricks, time management strategies.
- Also we can use this time to demonstrate new reports. Data mining is another great topic – what data do you need from Banner to make decisions and how do you get it in the most efficient manner?
- Set up CUIBO as a listserv so members can share quick tips or ask questions of their colleagues.
- Concern expressed about poor understanding across campus on the fundamentals of UI finances and what reports mean. We have an opportunity with Chart V and Banner 9 to wrap those trainings up with meaningful training to address these gaps.

July CUIBO Meeting

Discussion about date for CUIBO. The usual 2nd Thursday of the month falls during a critical week for closing FY18. The following week presents a problems for some because of a 3-day professional staff conference. Decided on Wednesday July 26th at 10am. Location TBD. Linda to send out calendar invite.