

- A. Budget Adjustment:** Pat Whitt demonstrated the new budget adjustment application. Through this application, users can create a new adjustment or search for any other adjustments that they have prepared for their accounts. Budget adjustments prepared others can be found when completed. Adjustments prepared on the Excel budget fund transfer form will not be accepted after June 1, 2006.
1. The application will be found in My Universe under the MEMFIS channel for users who are authorized to do budget adjustments. Once in the application, there is a help button which will take users to the Quick Reference Guide. The wrench icon is for budget maintenance and will only be used by the Budget Office.
  2. Once a budget adjustment has been completed, users will be able to search/sort by control ID, adjustment type, period, journal name, originator, or date range.
  3. Before a new journal is created, the correct workbook must be selected – either “active,” “development,” or “retired.”
  4. Journal naming rules remain the same (org number, initials, mm/dd/yy).
  5. The journal description is what will appear in the statement of account. Only 35 characters can be displayed. The line description is required.
  6. A budget adjustment can only be completed during an active GL period. The adjustment can be prepared in advance, saved, and then submitted when the GL period becomes active.
  7. Users will need to set up approval sets. Approval sets can be named.
  8. Users may also want to set up FYI lists. These lists would consist of people who don't approve the adjustment but should be notified that they are being processed. FYI lists can include up to 10 people.
  9. A “Show History” button is available for users to track who approved the adjustment, when it was approved, and also who was notified.
  10. An adjustment will time out in 3 days and can also be rejected by the approver.
- B. Discoverer Reports:** Eunice Dell demonstrated the drill down capability in the Personnel Expenditure Report and reminded users that Discoverer Reports nightly updates are currently not completed until after 9:30 a.m.
1. It is recommended users remove the “null” columns for ease in reading.
  2. Click the blue arrow by any of the column headings and select effective date to get monthly data. The data then can be sorted by month.
- C. Announcements:**
1. The FY06 closing schedule is available on the MEMFIS website. Some important dates to remember include:
    - a. Last day for credit card purchases to FY06 is June 20. Users will have until July 11 to process June procard statements.

- b. June 23 is the last day to prepare requisitions. Items must be received by June 30 to use FY06 funds.
- c. July 6 is the last day to process travel reimbursements for FY06.
- 2. An employee title changed requires a PAF except for Board approved faculty promotion/tenure.
- 3. A new Quick Reference Guide “Manager Self-Service” is available on the MEMFIS site.
- 4. Users were reminded to delete assignments for all graduating student employees. For student employees who had access to MEMFIS applications, an authorization form which terminates their responsibility should also be submitted.
- 5. An employee’s Emergency Leave balance will soon show up on Leave Balance Reports. In addition, due to changes in the AFSCME contract, employees will be able to rollover any unused emergency leave balance to the next fiscal year. More information will be available in June regarding Emergency Leave Balances.
- 6. The next meeting will be held June 15, 2006, at 1:30 p.m. in Room 201 McCollum Science Hall.