**Financial Affairs Collaboration Team (FACT)**

**June 2, 2016**

**Minutes**

**Present:**

Aguirre, Alejandre, Anderson, Apodaca, Badulis, Calderon, Chester, Contreras, DeLeon, Farre, Fuller, Gutterud, Guzman, Iannolo, Kuenz, Lopez, Maculsay, Prado, Salge, Smith, Valencia, Walls, Watkins

**Absent:**

Kelley, Levin, Lindsey, Paduntin

**Guest:**

Andrea Beechko

**General**

IT Equipment/Software Approval Form – Matias/Jacqueline

In response to the Audit finding related to IT Equipment/Software purchases, Matias and Jacqueline have been working on and presented the latest version of the IT Equipment/Software Approval form via the online tool, OnBase. The tool allows for automation and quick processing. The form will go live for Procurement Card purchases only, for now. Feedback from the group:

* Ability to submit with attachments (i.e. quotes)
* If users enter line by line on this form would like it to also feed into a PeopleSoft requisition
* Ability to provide multiple chartfield strings (split fund)
* Add the description of fund being used (Trust, Lottery, etc.)
* Ability to consolidate requests
* Ability to add a Budget Approver before VP approval

Pivot Tables – Michelle Fuller

Michelle shared her expertise using Microsoft Excel’s Pivot Table function. The data set she shared was from an IR report. To begin a pivot table: Insert -> Pivot Table -> Range = all rows and columns, New Worksheet. Select filters. To use Slicers: Options -> Insert Slicers. Select headers. If using more than one pivot table for Slicers: Options -> Pivot table connections. Select which pivot table to use as slicer.

**Accounting**

Scholarship Deadlines for FY 15/16

Del reminded the group to complete scholarship disbursements as soon as possible so that the UEC can process and they will hit this year. Further discussion will ensue to add scholarship deadlines to the deadline notification.

**Auxiliary Financial Services**

**Budget**

**Support Services**