

BDM Pilot Meeting Minutes

April 8, 2014, 10:30-11:30 a.m.

Attendees: Pam Grey, Pam Eberhardt, Ellen Lyon, Esperanza Contreras, Annette Perez, Chien Shih, Susan Malmgren (by phone), Joe Lampo, Deepa Prasad, Linda Koyama

- Max file size has been increased to 20 megabytes. If your computer is older than 5 years and you are in need of Silverlight, please submit a ticket.
- View Documents and Upload Documents buttons on SSB screens are working.
- A Purchase Requisition (PR) must be created before any of the backup documents can be uploaded into BDM. The PR is the document ID number that is used when indexing.
- Upload Documents button for INB conflicts with single sign-on. The work around consists of right clicking and then uploading the document. (One extra step). Table for now. Majority of our users are using SSB.
- Status of using IntelCheck to export/import images of checks into BDM: Still working on it. Target date of April 22nd.
- Pam will submit a ticket to have Form Fusion generate signed purchase order.
- Ryan needs to give access Ellen Lyon permission for reports. Susan will work with Ellen once Ryan gives her access.
- Purchasing Buyers Training on BDM went well. Easier to INB or SSB to attach since they aren't doing batch uploading. Only problems were due to the old slow computer in training room.
- B-F-Docs has 559 documents uploaded as of 4/7/14 at 2:30 PM
- B-F-ID has 741 documents uploaded as of 4/7/14 at 2:30 PM
- New issues:
 1. Uploading a receiving doc. No Banner doc type. Packing list will go under the PO number, not under the receiving doc number. If you look at the receiving document under FOIDOC and click the search key, it gives you an error. Possibly have Dave write the Y document number on the packing slip? Need to test.
 2. Can we tie the PO to the PR? Will ask Louis Chen.
 3. Form name FPIPURR is not working correctly, pulls everything on system, not just the docs associated with that PO. Susan will check to see if the instructions are set up. Susan will check the other forms as well this week. Pam will forward all the screen names.
 4. Buyers want to use FPAPURR to upload. Susan will investigate. If PO is canceled, you need to remember to update the new PO#. Concern about orphan documents. A

temporary requisition is created for change orders and then deleted. Requisition is canceled in INB but you can still see docs in BDMS.

5. There is a requisition for every change order. FPAPOAS associates the PO with the PR; not change order. Ideally there would be another column listing all the change order. After PO is finalized you can't add more PR. We need to ask the Ellucian action line. Ultimately, it would be desirable for the requisitions to be tied to the change orders. Possible for a batch program to collect all the change orders associated with a PO since the PO number will be the same; only the sequence #s will be different; then provide a screen to list them. Can this be done? Purchasing will look into other schools that use this, and also inquire in Banner Forum.
6. Next meeting with Steering Committee (Pam, Ellen, Hector, Kevin, Joe) is April 28th. It will be an overview of what has been done, where we're going. Once we have their approval then we need documentation and procedures in place. Susan will work with Pam on documentation.
7. Next target user: FF&E coordinator @ Foothill (Asha).
8. At De Anza all division admins are involved. May already have scanners. Need scope defined. Pam will have a conversation with Donna.