

## **BDM Meeting Minutes**

### **June 3, 2014 - 10:00 a.m. to 11:00 a.m.**

**Attendees:** Annette Perez, Pam Eberhardt, Joe Lampo, Ron Rayas, Asha Harris, Ellen Lyons, Linda Koyama, Susan Malmgren, Deepa Prasad

#### **Steering Committee on May 12, 2014**

- It appears that Hector's security concerns have been addressed. He approved the purchase of an additional scanner for Accounts Payable.

#### **Status of hiding SSB Add Documents button**

- The Add Documents button has been removed from the SSB Create Requisition screens.
- Joe & Ron have received some direction from Louis Chan. Ryan has provided his input. Ron now needs to implement it.
- All B-F-DOCS batches created by untrained users when the "Add Documents" button appeared in SSB will be deleted by Deepa.

#### **Training material and roll out of BDM to Campuses for PRs**

- Annette trained Asha Harris, Foothill FF&E Coordinator, this week. Asha is now attending our team meetings. She uses INB and found the process easy to learn. She is currently only putting in Measure C purchase requisitions and back up.
- Due to work load, no additional users will be trained until October for rollout Fall Quarter
- A good portion of the training will revolve around Purchasing Procedures. Therefore Purchasing will start working on training materials in August and will modify documents provided by ETS. They would also like to have a video.
- Susan sent MS Word versions of documentation to Annette.

#### **Status of roll out to AP**

- Staff has been training and now up and running.

#### **Outstanding Issues**

- When user encounters the "A unique key violation has occurred" message, the icon for "Select Indexes" does not display for Annette and Asha. It was determined that they are using Firefox and other users who are using a different browser are not having the problem. Annette will test with a different browser and see if she is still has the problem. She will report back to Deepa.
- When AP added additional users they determined that there needs to be coordination between Martin Varela who controls access to Finance and Bill Baldwin who controls Banner security. Joe Lampo will discuss with Chien and Ellen will discuss with Hector with the goal of getting the two key people to communicate and coordinate any future requests.

**The next meeting** will be Tuesday June 17<sup>th</sup> at 10:30