AGENDA

SLU Business Manager Meeting
June 15, 2006

Allied Health Auditorium 1043
10:00a.m.-12:00p.m.

1) Meeting Overview/Announcements: Linda Bantle
   • No meeting in July
   • FY2007 Meeting Calendar
   • Survey

2) Introductions: Linda Bantle
   • Vicki Cassady, Financial Analyst
   • Sharon Gajewski, Accounts Payable and Travel Manager

3) Change in Mail Codes: Tom West

4) Year End Closing Procedures: Greg Haney, Lisa Zoia and Marsha McBride

5) Purchasing Update: Janice Crawford

6) Travel Program Update: Linda Bantle
   • AXO New User Interface
   • Policy Revisions

7) Travel Management Best Practices – Panel Discussion: Mike Mueller, Kevin Stillman, and Denise Woods
Meeting minutes of the Saint Louis University Business Managers held at 10:00 a.m. on Thursday, June 15, 2006 in the Allied Health Auditorium, 1043.

Business & Finance Staff Present:

Bryan Pini   Mary Drexl   Lori Myers   Kathy Ellis
Lisa Zoia   Linda Bantle   LaVonnie Nettles   Doug Leavell
Lee Kneibert   Sharon Gajewski   Greg Haney   JoAnn Grant
Janice Crawford   Vicki Cassady   Marsha McBride

Number of Business Managers Present: 72

Linda Bantle welcomed everyone to the meeting and had the seven new Business Managers in attendance introduce themselves to the group. Members of the Business & Finance Division introduced themselves also.

Introductions-Announcements

Linda Bantle announced that there will not be a meeting in July and handed out the schedule of meetings for next year. All business managers will receive a survey in July asking for their input regarding the monthly meetings. The results will be shared with the group at the August meeting and will be used as a basis for the structure of the meetings for next year. Linda introduced Sharon Gajewski who is the new manager of Accounts Payable and Travel and Vicki Cassady who joined the Financial Planning and Budget Department as a financial analyst. Sharon’s number is 977-2400 and her email is sgajewsk@slu.edu

Change in University Mail Codes

Tom West, manager of the University Mail Services, addressed the business managers and announced that effective July, 1st Mail Services can not process mail with the 4-digit mail code. Mail needs to be marked with the appropriate Banner Fund number for postage charges. The Banner number can be in a barcode format which Mail Services highly recommends. This should eliminate typing and reading errors. This number can be printed directly on the mail piece or on paper attached to the mail bundle. The software has been upgraded and users will be able to process mailing packages from their desktop computer. Tracking mail, etc., will also be possible. Training sessions will be held in July. Watch Newslink for an announcement. Contact Tom West at westte@slu.edu to schedule a training session.

Year End Closing

Greg Haney, Lisa Zoia and Marsha McBride announced information pertaining to Year-End Processes. All pertinent information can be found on the Business and Finance Web Site

Remember to include date of service on your IDO’s and Deposit of Fund so that the Controller’s Office knows which fiscal year budget to charge/credit.

Travel Program Update

Linda Bantle reviewed the policy revisions and travel enhancements coming in July (see Travel Update information sheet posted on the Business Manager’s web site under handouts for 6/15)
Travel Management Best Practices – Panel Discussion
Mike Mueller, Department of Medicine, Kevin Stillman, School of Public Health and Denise Woods, Law School, had a panel discussion to share some of the solutions they have used to efficiently implement the travel program in their departments. Each department should make their own processes that work best for them. They all agree that: using detailed comments when you approve a trip will greatly help in the event of an audit, having an “expert” in each area of your division/departments will help and having back-ups for approvers will ensure that a trip is approved/denied in a timely manner. Do not submit trips for approval after noon on a Friday as it leaves too little time to be approved. Any emails that you receive from Linda regarding Travel updates can be re-worded to address your department and then forwarded along to your staff. Any articles on Newslink can be copied and forwarded as well. Some employees may be more inclined to read an email from their business manager than an article on Newslink.

Purchasing
Janice Crawford reviewed FY07 procedures for Purchase Orders (see Purchasing Update information sheet posted on the Business Manager’s web site under handouts for 6/15/06). If you need paper, order it now. All paper products will have a price increase effective July 1, 2006 with an additional price increase expected at the end of the first quarter.

Treasurer
Bryan Pini reported that the technical problem that caused problems with bi-weekly direct deposits is under investigation by IT and will be fixed before the next payroll run.

The meeting ended at 11:45 a.m.

Minutes respectfully submitted by Mary Drexl.
1. Fiscal Year ‘07 Purchase Orders
   - FY06’s purchase order number needs to be referenced when creating your new FY07 purchase order requisition – enter in comment section or document text
   - S007 – maintenance clause; S014 – lease clause
   - Standing orders for business stationery created under Curtis 1000 vendor number
   - Standing orders for Kinko’s DOC store products should be created under the Kinko’s vendor number

2. Paper / Paper Product Price Increase
   - Price increases estimated at $.20/ream beginning 7/1/06 – if needed, order now
   - Further price increases expected in the next quarter
Policy Revisions and Travel Enhancements Coming in July

- **AXO New User Interface**
  The new features that you will find in Cliqbook enhance the travel booking experience while making it easier for you to complete travel arrangements online. A summary of enhancements include:

  **Air**
  - Filter results by arrival or departure airport (or by both) without having to leave the results screen
  - Sort on carrier, price, time, or duration
  - Use the Fare Compare feature to analyze selected fares side-by-side
  - View either detailed or condensed views of fare information
  - Search by schedule in a matrix view with sorting and filtering capability

  **Car**
  - Matrix display of vendors, car size, and price
  - Sort detailed list by policy, price, vendor
  - Click on picture of car to see capacity information

  **Hotel**
  - Hotel Ratings!
  - Filter by amenity, chain, or search by name
  - Sort on preference, distance, price, chain, or rating.
  - Use the Fare Compare feature to analyze selected rates side-by-side

- **Enhanced Transportation Calculator (additional variables added)**

- **Additional options for airport parking**

- **Additional options for lodging reimbursement when attending a conference**

- **Option to book personal travel using Amex traditional travel counselors**

- **Other areas under consideration...