BDM Meeting Minutes
April 22, 2014 10:30 a.m.-11:30 a.m.

Attendees: Pam Grey, Annette Perez, Pam Eberhardt, Esperanza Contreras, Ellen Lyon, Chien Shih, Ron Rayas, Susan Malmgren, Deepa Prasad, Linda Koyama

Change Order Processing - Temporary requisition (reservation) are created when a change order is entered:

- BDM does not tie it to its PO
- It was agreed that for the short term, documents will be indexed by the end user to the temporary req. When the buyer processes the change order, they can modify the index of the documents attached to the temporary PR to move them to the PO before the temporary requisition is deleted
- Long term, we will determine if an automated batch process may be able to change the indexes to the original PO number on a regular basis
- Due to the number of change orders (up to 15), Purchasing would like to somehow specify change order #1, change order #2 etc. (possibly annotate the document or add to the list of document types). Purchasing will make the decisions internally;

Indexing receiving documents

- End user will scan in and index against the PO.
- FPIRCVD form, can be modified it so that all the receiving documents will be displayed by entering the PO.

View and Upload Documents buttons on SSB screens are working without any problems

Cannot tie a PO to PR in INB according to Louis.

FPIPURR was coded to show only requisitions; would like to have FPAPURR coded the same.

Status of Intellicheck processing:

- Ron reported he is having a small server issue but hopes testing can start this week.
- All banks will be included.
- Ron will notify Ellen when she can start testing.

Training materials for end users

- Will include how to use SSB to create a req. Pam E. needs to send screen shots to Susan by Monday, April 28th.
- Will include how to use the BDM Suite (if you have BDM access, you have access to BDM Suite)

- Roll out to Asha next after receiving okay from steering committee. Initial training documentation should be focused towards Asha (using INB).

Security
- Access to BDMS will only show the filing cabinets that a user has permission to see. Security classes have been established.
- Steering committee meeting April 28th will determine if rollout will proceed. Susan would like to be included by phone.
- Anything with a SS# (i.e.W-9) should only be in B-F-ID. Important piece for training. Buyer have been instructed to send all sensitive documents to Ellen for inclusion in B-F-ID.

Long term goal is to go more paperless in order to reduce the amount of scanning needed in the future.