



Business Officers Leadership Academy
Applied Learning Project

Presented by:
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University Controller's Office
System Administration

Creation of a SUNY Lapsing Period Reference Page on the University Controller's Office SUNY BLUE Page

www.suny.edu



What is the Business Systems Team of the University Controller's Office?

Liaison: a person who helps organizations or groups to **work together** and **provide information** to each other

a **relationship** that allows different organizations or groups to work together and provide information to each other

Merriam-Webster

University Controller's Office (UCO) Business Systems Team is a liaison between:

- Campus users and SUNY Finance & Management System (FMS)
- Campus users and the New York State Statewide Financial System (SFS)
- Campus users and other NYS Agencies and their systems (OGS, OSC, etc)
- Campus users and SUNY Business Intelligence (BI)
- Campus users and Vendors

Office of the University Controller: Business Systems Team

CONTACT INFORMATION AND CAMPUS ASSIGNMENTS WITH SFS DEPARTMENT ID

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CAMPUS ASSIGNMENTS

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SUNY Fiscal Year: July 1st through June 30th

SUNY Lapsing Period: July 1st through September 30th** - Time period when previous fiscal year transactions can still be made and the year closes

** Depends on where the 30th falls on the calendar

Survey of UCO Business Systems Team:

- UCO Business Systems Team reps average 150-200 email/day (Winter semester break low/Summer (lapsing) peak)
- UCO Business Systems Team refers a campus user to UCO SUNY Blue Page 3-5 times/week
- UCO Business Systems Team receives FAQs regarding lapsing daily during the lapsing period.

Survey of campus users confirmed the FAQs.



The State University
of New York

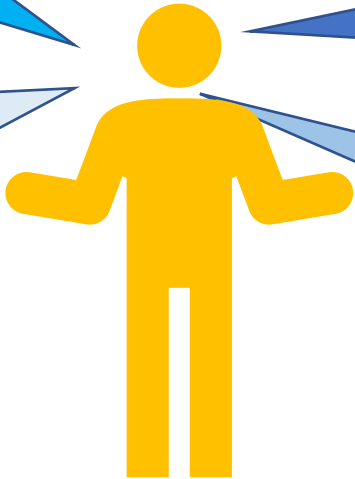
Will FMS be
down long?

How do I know what
docs are still
encumbered and
what report do I run?

What funds
are lapsing?

Who is my
UCO rep?

When is the last
day I can pay a
voucher? Or "can
I still...?"



Why is the balance
in BI different than
FMS/SFS?



The University Controller's Office SUNY Blue Page



- Home
- Business Intelligence (BI)
- Finance
- Calendar
- Contacts
- Forms
 - SUNY Forms
 - SFS Forms
- Job Aids
 - Accounting Journals
 - Accounts Payable
 - Chart of Accounts
 - Other Topics
 - Procurement
 - Procurement Card
 - Receiving
 - Workflow
- Lapsing FAQs
- Presentations
- Statewide Financial System

<https://blue.suny.edu/departments/UCO/SitePages/Home.aspx>

Lapsing FAQs

+ new document or drag files here

All Documents Find a file

Name	Modified	Modified By
2021 August UCO Newsletter 1	About a minute ago	cen-oliverch
Fiscal Year 2020-21 Lapsing	A few seconds ago	cen-oliverch
FUNDS that will Lapse on September 30th	About an hour ago	cen-oliverch
Lapsing Period Checklist	36 minutes ago	cen-oliverch
Lapsing Period Definitions	About an hour ago	cen-oliverch
Reports and Inquiries Helpful during the Lapsing Period	10 minutes ago	cen-oliverch

Useful Tools

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All Documents Find a file

Name	Modified
Chart of Account Fiscal Coding Structure	October 27, 2020
Expenditure Object	March 25
Fringe Benefit Rates History	December 8, 2020
NYS W-9	October 27, 2020
STIP Interest Rate History	October 27, 2020
SUNY Accounting Codes Manual	February 17
UNSPSC Codes	November 3, 2020
URAS Crosswalk BI	October 29

Procurement Job Aids

+ new document or drag files here

All Documents Find a file

Name	Modified
SUNY Job Aid - Item Requisition	A few seconds ago
SUNY Job Aid - Item Purchase Order	A few seconds ago
SUNY Job Aid - Misc Requisition	A few seconds ago
SUNY Job Aid New SUNY Procurement Contract_Draft	January 20
SUNY Job Aid_Procurement Contract Amendment_Draft	January 20

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The University Controller's Office SUNY Blue Page

Contacts

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All Documents ... Find a file

✓	File Name	Modified
	Intra-Agency Journal Contacts	... October 20
	OSC Contacts	... January 21
	SUNY Campus AP Contacts (2) ✳	... Yesterday at 9:06 AM
	SUNY Campus Employee Reimbursement Contacts	... November 5
	UCO Business Systems Team Contact Information and Campus Assignments	... August 13

Business Intelligence (BI) Finance

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All Documents ... Find a file

✓	File Name	Modified
	BI Finance Cash Reporting Dashboard Training	... October 29
	BI Finance Data Dictionary	... October 29
	BI Finance General How-to Dashboard Training	... October 29
	BI Finance Procurement Dashboard Training	... October 29
	BI Finance Property Control Dashboard Training	... October 29
	BI Finance Stars and Dimensions	... October 29
	How to Use BI Dashboards - Basic Training-20200422 1957-5	... October 29
	HR Pending Payroll Encumbering Process	... October 29
	List of Available BI-Finance Dashboards and Pages	... October 29

Additional Findings:

Campus use of UCO SUNY Blue page low

- Better advertising through email signatures and mention at all speaking opportunities and campus encounters.

Better use of calendar and UCO SUNY BLUE Page as a whole.

- Deadlines and events added to calendar
- Presentations section added
- Workflow section added

Check for new updates!

- Policy PO listing and dates
- Interagency payment FAQs



Any questions?

