

## DASH Institutional Working Group – 08/04/2025 – Minutes

**Attendees:** Jonathan Lawshe, Ammar Ammar, Michael Ebbs, Benjie Harmon, Amanda Fryer, Chandra West-Alston, Judi Waldrip, Wesley Byerly, and Keysha Fuller

**Other Members:** George Ninan and Brenda Murrell

### Meeting notes:

- **Approval Layer for Marketplace Orders:** Chandra and Keysha discussed the new approval layer added to marketplace orders to ensure accurate chart of accounts and SPN information before creating purchase orders. Keysha mentioned positive feedback and the inclusion of this information in mandatory training sessions.
- **Tracking Marketplace Orders:** Keysha explained the new approval step for marketplace orders and the availability of PO status and marketplace order reports to help business office managers track orders and their workflow.
  - **Automatic Approvals:** Keysha highlighted that some of the approval steps are automatic, based on the chart of accounts or SPN number, regardless of whether a requisition approver has been set.
- **Delegate for Requisition Approvals:** Judi inquired about the possibility of having approvers act as delegates for order tracking, especially for items from Amazon with price discrepancies. Keysha clarified that there is no current delegate for buyers but will investigate further.
- **Unreconciled Procurement and Travel Card Charge Reports:** Keysha announced that the campus will soon have access to unreconciled procurement and travel card charge reports, which will be shared with CBO and business managers.
- **Payroll Report Availability:** Chandra mentioned the upcoming availability of a payroll report for departments, which will include essential information for reconciliation and verification. Feedback from various colleges is being considered to make the report more comprehensive.
- **Effort Certification Issue:** Wesley raised concerns about the delay in effort certification due to unreliable information from Dash. Chandra and Michael agreed to investigate the issue further and find out the responsible person for the research module.

- **Payroll Report Feedback:** Michael and Chandra discussed the need for additional fields in the payroll report to make it more functional. Chandra will follow up with Brian to ensure the requested fields are included before making the report live.
  - **Additional Fields:** Michael and Chandra discussed the need for additional fields in the payroll report to make it more functional. They emphasized the importance of including funding distribution details to enhance the report's utility.

Follow-up tasks:

- **Delegate Functionality for Buyers:** Ask whether there is a way to set a delegate for buyers in the current system and report findings back to the group. (Keysha)
- **Marketplace Order and PO Status Reports:** Forward the PO status and marketplace order report to Judi for her to test and evaluate its usefulness. (Keysha)
- **Effort Certification Module Status:** Find out who is responsible for the Research module and the status of the effort certification issue, and report back to the group. (Chandra, Michael)
- **Payroll Report Updates:** Email Brian to confirm whether the requested fields from Chattanooga, Memphis, and others have been added to the payroll report, and request to review another version before it goes live. (Chandra)