

Kuali – Financial Information System
University Place Conference Center, IUPUI, Indianapolis
Fall 2005

Tuesday, October 11th

7:30 Registration & Continental Breakfast

8:30 – 10:00 General Introduction to Kuali
Overview of the Financial Information System, Chart of Accounts,
Transaction Processing, Workflow & Decision Support, Room 118
Kathleen McNeely, Interim Assistant VP of Finance, FMS
Barry Walsh, Managing Director, Operations, FMS
Damon Dorsey, FIS Training Specialist/Timekeeping Project Leader, FMS
Sterling George, Director of Operations, FMS
Bill Overman, University Chart Manager, FMS

10:00 – 10:15 Break

10:15 – 11:30 Continued - Overview of FIS, Chart of Accounts, Transaction Processing,
Workflow & Decision Support, Room 118

11:30 – 1:00 Lunch in the Bistro

1:00 – 2:45 Functional Sessions
Financial Documents
Damon Dorsey, FIS Training Specialist/Timekeeping Project Leader, FMS
Joan Hagen, Chief Accountant, FMS

Capital Assets
Theresa Cain, Capital Asset Management System Data Manager, FMS
Anna Jensen, Director A/R, Auxiliary Acctg., & CAMS, FMS

Labor Ledger
Sterling George, Director of Operations, FMS
Jennifer George, Transaction Analyst/Project Leader, FMS

Technical Session
Kuali Architecture, Development Standards & Methodology
Jim Thomas, Manager, Systems Integration, UITS
Brian McGough, Lead Systems Analyst, UITS

2:45 – 3:15 Break

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3:15 – 5:00

Functional Sessions

Research Administration (pre- and post-award)

Jim Becker, Director Contract & Grant Administration, FMS

Steve Martin, Assistant VP, Research Administration

Budget Construction

Steve Keucher, Assistant VP/University Budget Director, UBO

Susan Parrish, Associate Director, UBO

Endowment

Mary Wheeler, Associate Controller, Cornell University

Technical Session

OneStart Workflow Overview, Room

Jim Thomas, Manager, Systems Integration, UITS

Brian McGough, Lead Systems Analyst, UITS

Wednesday, October 12th

7:30

Continental Breakfast

8:00 – 9:45

Functional Sessions

Purchasing & A/P

Peggy Maschino, Manager, Accounts Payable, FMS

Lorelei Meeker, Interim Director of Purchasing, Purchasing Dept.

Non Student Accounts Receivable and Auxiliary Accounting

Anna Jensen, Director A/R, Auxiliary Acctg., & CAMS, FMS

Michael Lewis, Manager Auxiliary Accounting, FMS

Technical Sessions

Kuali Technical Question & Answer

Jim Thomas, Manager, Systems Integration, UITS

Brian McGough, Lead Systems Analyst, UITS

9:45 – 10:00

Break

10:00 – 11:00

Kuali Demonstration, Room 118

11:00 – 12:00

Wrap Up and General Discussion, Room 118