I. Welcome and Announcements
Bill Prigge welcomed everyone to the Health Sciences Campus and shared a little information about the campus itself. Anyone wanting more information on the Campus or interested in taking a tour should contact Bill at bprigge@uga.edu.

II. Other Business
A. FacultyJobs Update – Mike Gorman (click here)
   i. Mike Gorman, from the Office of Human Resources, reviewed the changes that will occur in FacultyJobs.
   ii. There will be a consolidation of FacultyJobs and the iPAWS system, which will provide the ability to choose multiple approvers.
   iii. These changes will provide a greater understanding of organizational make-up.
   iv. The changes should be completed by Monday, July 2.

B. OneCard Update – Brett Jackson (click here)
   i. Brett Jackson reviewed the current RoadMap of where the OneCard process is at this stage.
   ii. OneCard will use the EV2 Card technology for future UGA Cards. This will allow for greater security and for cards to communicate with the various readers.
   iii. If a purchase order comes through for readers, please ensure that the individual has spoken to Brett Jackson first.
   iv. Anyone with questions can e-mail OneCard@uga.edu for more information or visit onecard.uga.edu for current FAQs.
   v. All current readers will eventually have to be replaced.

C. OneSource Project Coordinator Discussion
   i. Monthly Financial Status Report Procedures – Holley Schramski (click here)
      a. Allison Davis (Accounting) is working with Anjali Dougherty (Internal Audit) to revise FAPL Finance Policy 1.1 “Account Status Reports”. Anyone who has suggestions for this language should contact Allison at ahdavis@uga.edu.
      b. The concept behind the revisions to 1.1 is to clarify the expectations behind the monthly review of financial status (currently the snapshot Account Status Report and with the PeopleSoft implementation, the Financial Status Report) versus when a “reconciliation” of sub-systems/sub-ledgers is required. For example:
         i. Units with no sub-system feeding the PeopleSoft General Ledger and no departmental system that “replicates” transactions in the PeopleSoft system and is used for financial decision-making will not need to perform a “reconciliation” since there is no system to “reconcile” against.
         ii. Units using sub-systems to generate files or transactions which are loaded to the PeopleSoft system will be responsible for reconciling that sub-system to the PeopleSoft system.
      c. Some BSAG members asked about the timeliness of charges by an internal UGA service unit to the PeopleSoft General Ledger. The example provided was animal services charges. Kevin Burt in the Office of Research explained that these type of charges will be uploaded into PeopleSoft on a routine basis and this should help facilitate more timely information regarding animal services charges.
ii. Roles and Training Update – Sarah Fraker and Kathy Hines (click here)
   a. Sarah Fraker reviewed the workflow/approver roles in PeopleSoft.
      i. Payment Requests have been added to the Default Employee Role.
      ii. There is no delegate ability on payment requests.
      iii. Approvers cannot edit in workflow.
      iv. In addition to the Initiator being aware of changes, each approver can also rest assured that the information that they based their approval on has not changed (i.e. Employee Reimbursements, that employee has provided confirmation that all information is correct and that all monies are due to them. If someone could change that along the way, that confirmation is not valid.)
      v. For transactions that require approval, PeopleSoft Financials workflow routes transactions to defined sets of approvers. In general, these transactions fall into two categories: financial transactions (expenses and budgets) and non-financial transactions (chart of account requests). In general, if a transaction will not be approved because it needs modification, it is returned to the initiator so that the initiator is informed about the changes needed and can make those adjustments. This also ensures that all approvers can be confident that the information that they approved has not changed.
      vi. There is additional functionality in some areas for editing by individuals other than the initiator, for instance, a delegate in the Expenses module or by viewing and editing the originating document in Budget Journals. While additional information may be added during the approval process, such as the addition of attachments, etc., changes to core information such as amounts or Chart of Accounts fields, does require workflow to be re-initiated.
      vii. The project team is developing a matrix that details the specific actions taken when an approver approves, denies, rejects or sends back a transaction based on the transaction type. This matrix will also indicate where and if edits may be made outside of the approvals process. This matrix will be published and made available for review by all OneSource stakeholders as you consider fine-tuning your security and workflow submissions prior to go-live.
      viii. A re-ask will be occurring in May to further manage these roles.
   b. The UGA Financials Page will include online registration through Training & Development.
      i. May and June will be focused on Practitioner Training
      ii. Users who have a “security role” will have to attend the OneSource 101 course, which will be a pre-requisite for other training courses offered.
      iii. Users must complete training or their permissions will be revoked.

Topics of Discussion Included:
Shadow Systems Going Away and Training Staff Appropriately
Monthly Excel Sheets to Provide a Snapshot
Hyperion will ultimately be your “shadow system”

The next BSAG meeting will be Wednesday, May 9, from 3:00 – 4:30 p.m. at the Miller Learning Center, Room 214