Meeting: Business Services Advisory Group

Date and time: Friday, January 9, 2015   1:30-3:00

Location: Room K, Georgia Center

I.   Welcome
Holley Schramski welcomed the group to the meeting.

II.   Old Business
A. Holley announced updates to the BSAG website.
    http://www.busfin.uga.edu/bsag/index.html
B. Kevin Burt spoke on the funding process for classroom equipment.
    • Kevin described the funding sources for classroom refreshing including the Student Technology Fee. Essentially CTL has a very small budget for this purpose and the Tech Fee committee has an allocation process.
    • Chris Miller reminded everyone that January 15, 2015 is the due date for FY15 one time request for funds from the Provost.
    • Holley Schramski suggested to the group to talk to their Dean's about including funds for classroom refreshing in the FY 16 budget meeting materials.
C. BSAG suggestion # 9 was discussed. It was decided that another group would be established to identify short-to-medium term solutions for the visibility of all paper processes. Bill Cheesborough indicated that CAES uses Echo Sign, an Adobe product to provide this functionality for the college. Bill mentioned that Gwen Moss is planning to implement it within PSO. Holley mentioned that Chris Wilkins has been investigating the DocuSign product for this purpose. This work group will become # 9a and Bill Cheesborough, Sean Rogers, Gwen Moss, Chris Wilkins and Jennifer Collins will serve as team members.
D. Brandon Silvers provided an overview of a web-based leave request system. The system was developed several years ago as a means to eliminate paper leave requests and automate the approval process. The system is currently used by Budgets and 7 other F&A departments. However, the system was not created as an enterprise solution and resources within Finance & Administration would not be able to support it campus-wide. Brandon explained that the code is available to colleges/schools/units if they would like to implement and support the system internally. This would require purchase of a Coldfusion license, other technical requirements, and the system does not interface with the e-Leave system used as the official system of record for leave accrual and use data. Many BSAG representatives expressed interest in a demo and information session as they feel it might be beneficial until an enterprise solution is

available. Brandon will set up a date/time for a demo and Q&A session and encouraged BSAG members to bring their IT staff. Brandon will send an announcement to the BSAG-L with further information.

E. Holley provided some information on issues with the e-Leave system which were discovered in the annual financial audit. Kim Eberhart in HR requested BSAG participation to work on several changes with respect to the e-Leave system and associated processes to address the issues identified. A group was established which includes, Kim Eberhart, Patti Orr, Brooke Rooks, Toni Rogers, Carey Paul, and Terri Akers.

III. New Business
A. Holley reviewed with the group proposed changes to the carry forward request process. These changes remove the need for requests to be review and approved centrally. Instead colleges/schools/units will follow the policy requirements but manage approval and use at the unit level. As there were no objections to these changes, they will be adopted for FY15 year end and noted in the in the year end letter.

B. Discussion of survey results and formation of new work groups:

No.	Suggestion:	Disposition:
9a.	Visibility of all paper processes	Assigned to workgroup: Bill Cheesborough, Sean Rogers, Gwen Moss, Chris Wilkins, Jennifer Collins.
11	Have a hotline available during budget development	The Budget Office will schedule a Budget Development Planning Session Workshop. This will be time for Q&A and sharing of best practices and new ideas.
12	Eliminate the need to fax backup to confirm approval on salary actions – example Salary Supplement Agreement Form	Assigned to workgroup: Chris Miller, Ken Mccollum, Dan Helmick. Note: be aware of group 9a and if their work could be of assistance.
13	Streamline Kronos supervisor set up to be electronic not manual form.	Chris Wilkins checking into this and will report back to BSAG
14	Multiple forms for single action e.g. A salary action form and Salary Supplement Agreement Form are required for salary supplements	Included in #12. Note: be aware of group 9a and if their work could be of assistance.
15	Have the Accounting System hold more than 2 years of data so that we can query information for grants that are more than 2 years old. Chad informed the group that the IMS system holds 25 months of data; the query tables hold 4 years of data.	Chad Cleveland will create an online catalog listing the tables and number of years of data in each table. Chad Cleveland will

		also work with AIS and look into restoring additional data.
16	Processes currently done on paper that should be electronic including: Travel Authorities and reimbursement requests. Will also look at #75 T/A electronic. Mods(Faculty Staff, Student) Enforcement change regarding reimburse when TA completed after travel countries w/sanctions	Travel Process Improvement Workgroup established including: Jeanine Meeler, Emily Czaplinski, Ashley Young, Sarah Fraker, Becky Wortham, Jennifer Collins, Robert Derrick. Note: be aware of group 9a and if their work could be of assistance.
17	Budget Entry – start with current staff budget and enter changes only.	Tabled
18	Streamline budget amendment process	Tabled
19	Better training for Web DFS that involves more of the electronic processes in addition to pen/paper calculations of EFT	Completed; Incorporated into new class.
20	Tracking student assistant/LBCLR designated employee's ACA related 1300 work hours procedures and policies.	Human Resources is working with BOR on USG system-wide solution.
21	Making changes in Kronos	Tabled
24	Ability for employees and supervisors to electronically indicate approval after it is signed off at unit level. The paper signature paralyzes unit payroll staff.	Assigned to workgroup: Ashley Young, Karen Kimbell, Karen Hart, Amy Thomas, Erin Bruce Julie Camp, Lindsey Barner. Note: be aware of group 9a and if their work could be of assistance.
26	Relocation reimbursement process is done manually, not electronically (i.e. reimburse new faculty member on multi-level pink forms and manually submitted for payment.)	Assigned to workgroup including: Andre Simmons, Brooke Rooks, Becky Wortham, Marsha Dickerson. Note: be aware of group 9a and if their work could be of assistance.

As there was no further business, the meeting was adjourned at 3:00.