**Meeting:** Business Services Advisory Group  
**Date and Time:** Wednesday, June 6, 2018, 3:00 – 4:30 p.m.  
**Location:** Caldwell Hall, Room 204

---

I. **Welcome and Announcements – Bill Prigge**  
Bill Prigge welcomed the group and reminded everyone to join the OneSource Team for the OneSource Team Celebration on Wednesday, June 13 at the Special Collections Library.

Bill also welcomed feedback on how the monthly BSAG meetings are working. No feedback was provided at the time so meetings will continue as currently scheduled.

---

II. **Other Business**

A. **Exception and Emergency Processing and Pre-Approval of PCard Purchases – Annette Evans (click here)**
   i. Annette Evans reminded everyone that today (June 6) was the last day to submit Purchase Orders. As a fun fact, 325 purchase orders were submitted so far that day.
   ii. June 7 – June 25 will be for exception processing only. An explanation of why a purchase request could not be submitted by the June 6 deadline, along with a reason for the need and the impact if not processed.
   iii. June 26 – July 9 is the blackout period. UGAmart will not be available but Chief Business Officers will have access to a temporary system. Only emergency purchases will be allowed and FY19 funds will be used.
   iv. Pcard Preapproval will not be available in UGAmart from June 26 – July 9. Recommend use of the alternate process from June 18 to July 31, 2018.

B. **FacultyJobs-iPAWS Consolidation Update – Michael Gorman (click here)**
   i. Mike Gorman updated the group on the current status of the UGAJobs update. Currently, the system is still set to go-live July 9. Mike reviewed what to expect during the consolidation and current training opportunities.
   ii. FacultyJobs blackout period begins (6/29 – 7/9 through the week of July 4). No transactions (postings or applicants) in FacultyJobs during this blackout period.
   iii. After July 9, Administrators and Applicants will have a one-stop shop. Currently, performance evaluations will not be housed in UGAJobs, but it is a future possibility.
   iv. If you find that travel authorities are not routing correctly in PeopleSoft, then “Reports To” information is not up-to-date in the system. Please contact Mike Gorman to let him know.

C. **HR News Customer Service Platform – Traci Strickland**
   i. Traci Strickland updated the BSAG group on a new customer service initiative in Human Resources.
   ii. Team Dynamix is currently under design and development to process HR inquiries.
   iii. Any existing e-mail addresses currently provided by HR will be filtered through this system and received by a specific group of people.
   iv. Team Dynamix will allow customers to view the status of their request.
   v. More information on this initiative will be coming out to the group shortly.

D. **Foundation Accounting Update – Rebecca Caravati and Chris Seltzer**
   i. Rebecca Caravati reviewed the matrix on the first pass of transactions that will directly go to the Foundation.
   ii. Chris Miller requested that the Foundation add “Benefits and Payroll” to their documentation.
   iii. Sean Rogers suggested that some wording be provided for non-employees and honorariums.
iv. Modifications will be sent to the group as they are made. Matrix will also be listed in the policies and procedures listing on the website.

v. Chris Setzer reviewed budget process for FY19.

vi. For endowed funds, the FY19 spending allocation only will be budgeted as of July 1.

vii. For non-endowed funds, total available funding will be budgeted as of July 1.

viii. For endowed funds, any net carry forward of the FY18 spending allocation will be budgeted as of July 23.

E. Mainframe Decommission – Stacy Boyles (click here)
   i. Stacy Boyles updated the group on the current mainframe decommission.
   ii. System changes can be found on the OneSource website along with additional details on each specific system.
   iii. Departmental Systems Surveys went well and only a few questions were received. An updated master system spreadsheet list will be available on Friday. Reminders will be sent to those specific system users.
   iv. More information on the mainframe decommission can be found on the EITS website as well.

F. University Business and Accounting Services Reorganization – Holley Schramski and James Shore (click here)
   i. Holley Schramski and James Shore reviewed the upcoming Finance Division reorganization taking affect July 1, 2018.
   ii. Accounts Payable and Procurement are now under the direction of Kathy McCarty.
   iii. James Shore is already responsible for day-to-day oversight of the Police Department and Emergency Preparedness. Insurance and Risk Management will move from Administrative Services to Emergency Preparedness.
   iv. Support Services is a new line in the organizational chart. This grouping will include:
      a) Service Desk, under the direction of Billy Knight
      b) future FACTS Program and other training/outreach efforts under the direction of Crystal Rogers,
      c) IT support under the continued direction of Brandon Silvers, and
      d) OneSource under the direction of Holley Schramski.

G. OneSource Project Coordinator Discussion
   i. FY17 & FY18 Data and FY19 Documents – Sharon Logan
      a) Sharon provided an update on how attributes for Operation G account can vary from year to year. These attributes are used on legacy G accounts to account for the fund source: state appropriations, tuition, other general funds. Therefore, if anyone has questions about fund source in the cross-walked FY17 – FY19 data please inquire and ask questions; trust but verify all of the data.
      b) As we move into FY2019, you may see fund sources that you are not familiar with. If so, please contact the Service Desk with any questions you may have. We want to ensure confidence in the data.
      c) FY19 Budget/Faculty Contracts: FY 19 Personnel documents can now be submitted. No Budget Amendments whether stand alone or attached to a personnel, document will be accepted through WebDFS for FY19. Budget changes will be processed in UGA Financial Management System starting July 2.

ii. HCM Timeline Key Dates and Project Update – Diane Kirkwood (click here)
    a) Diane reviewed the progress to date on the OneUSG Connect transition. Currently, we are in the configure and develop phase of the project.
iii. **Access Requests – Sarah Fraker**
   
a) Access Requests forms are to be submitted by a manager, not an employee.

*The next BSAG meeting will be Wednesday, July 11, from 3:00 – 4:30 p.m., Caldwell Hall, Room 204*