

Business Services Advisory Group



Welcome and Announcements

Co-Chairs: Anjali Dougherty & Shawn Hill



Welcome and Announcements

- Tim Chester will provide a Unified ERP update.
- We will provide an update on UGA's new Budget system.
- Several new and upcoming process improvements to discuss.
- Congratulations to **Leah Walshe** (College of Public Health) and **Anjali Dougherty** (Public Service and Outreach) for their new CBO roles!
- **Sadie Brown** is serving as interim CBO for Terry College and **Sige Burden** is serving as interim CBO for University Human Resource.



Unified ERP Update




Dr. Tim Chester, CIO

Vice Chancellor for Information Technology, USG

UGA VP for Information Technology, UGA




USG ERPs Current State

Human Resource Systems

-  = Hosted by Vendor
-  = Hosted by USG
-  = Hosted by Institution






Financial Systems

-  = Hosted by Vendor
-  = Hosted by USG
-  = Hosted by Institution



Student Information System

-  = Hosted by Vendor
-  = Hosted by USG
-  = Hosted by Institution





COLUMBUS STATE UNIVERSITY



GORDON STATE COLLEGE



ATLANTA METROPOLITAN STATE COLLEGE
Bring your brilliance.



Georgia Gwinnett COLLEGE



GEORGIA COLLEGE
GEORGIA'S PUBLIC LIBERAL ARTS UNIVERSITY



Abraham Baldwin Agricultural College



East Georgia STATE COLLEGE®



Albany State University
UNIVERSITY SYSTEM OF GEORGIA



GSW
GEORGIA SOUTHWESTERN STATE UNIVERSITY



DALTON STATE



CLAYTON STATE UNIVERSITY



SAVANNAH STATE UNIVERSITY



Middle Georgia State University



FORT VALLEY STATE UNIVERSITY
EMPOWER the POSSIBLE.



VALDOSTA STATE UNIVERSITY



COLLEGE of COASTAL GEORGIA
UNIVERSITY SYSTEM OF GEORGIA



UNIVERSITY of West Georgia



SOUTH GEORGIA STATE COLLEGE



GEORGIA SOUTHERN UNIVERSITY



AUGUSTA UNIVERSITY



UNIVERSITY OF GEORGIA



Georgia Tech



GHC
GEORGIA HIGHLANDS COLLEGE



Georgia State University






UNG
UNIVERSITY of NORTH GEORGIA






KENNESAW STATE UNIVERSITY

Degree Audit System

-  = Hosted by Vendor
-  = Hosted by USG
-  = Hosted by Institution



Learning Management Systems

-  = Hosted by Vendor
-  = Hosted by USG
-  = Hosted by Institution


KENNESAW STATE UNIVERSITY


Georgia State University


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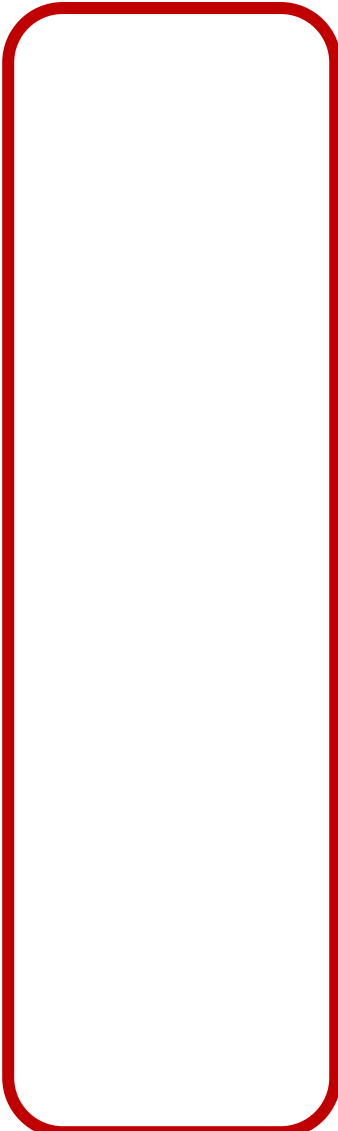
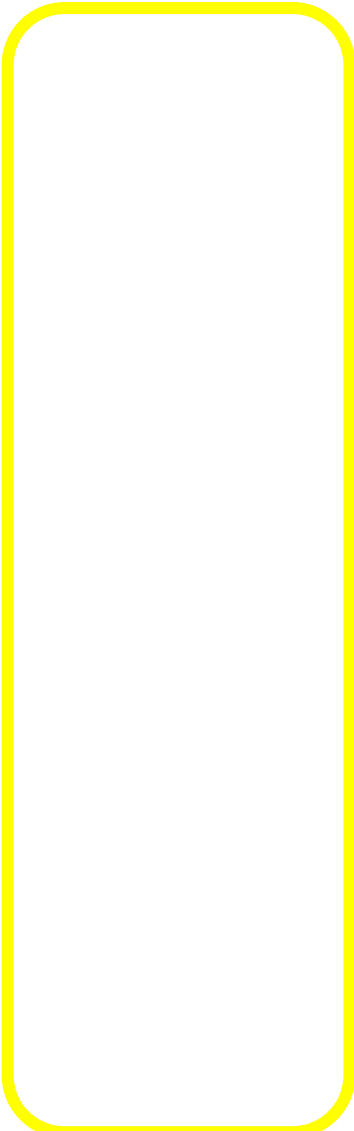

UNIVERSITY OF GEORGIA


COLLEGE of COASTAL GEORGIA
UNIVERSITY SYSTEM OF GEORGIA


UNIVERSITY of West Georgia


AUGUSTA UNIVERSITY


GEORGIA SOUTHERN UNIVERSITY



USG Future State

- **Vendor trends are to move to SaaS**
 - **End of life consideration for on-prem solution is a major driving factor**
- **Institutional trends are to move to SaaS**
 - **Resource constraints**
- **State HE systems trends are to move to SaaS**
 - **Unified ERP system is common practice**
 - **Keeps cost escalators down**
 - **Better Student, Faculty and Staff experience**
 - **Improves data analysis and reporting**



UNIVERSITY SYSTEM
OF GEORGIA



dreamstime.com

Unified ERP Progress to Date

- Project Prep and Planning Continues
 - Business case developed – (being updated)
 - **Pre-requisite project planning**
 - **Project planning & governance strategy**
 - USG Software Inventory ERP related
- Higher Ed specific requirements demo's –TBD

**Submitted Preliminary
HR & Finance
Requirements* to State**

USG Requirements
included in State RFI

**Business Case
Developed**

Challenges and Opportunities
cataloged

**Prerequisite Projects
Identified**

Project initiatives
documented streamlining
Unified ERP implementation



**Participated in
Demonstrations**

Full participation in Oracle
Cloud and Workday
demonstration for Georgia
State Agencies

**Budget Request
Developed**

10 year budget forecast
developed

**Project Planning
& Governance
Consultation**

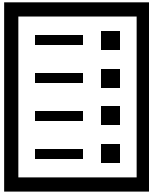
ISG partnership with SI to
develop Unified ERP
governance and
implementation approach

*Initial requirements drafted for Student system in November 2022 in preparation for future requirements gathering sessions with institution project teams.

Overview

- **NextGen = State of Georgia's** named project to implement a **Financial and HR ERP** unified system.
- **Unified ERP = University System of Georgia's** named project to implement a **Financial, HR, and Student ERP** unified system.

Unified ERP Pre-Requisite Projects



Project Planning



Unified IDM



TALENT MANAGEMENT



GRANTS SPONSORED
PROJECTS



Integration Platform



Integrated
Development Platform



SERVICE MANAGEMENT



DATA WAREHOUSE

NextGen Progress to Date

- Project Work Continues
 - Communication and Organizational Change Management & Backfill underway
 - NextGen ERP Vendor Selection: Workday
 - Solution Implementor Selection: Deloitte
 - Go Live – HR & Payroll April 2025



Deloitte.

Questions

Faculty Affairs Committee

Co-Chairs: Carly Surratt & Mike Gorman



New process for reporting faculty evaluation scores

- ## BSAG Request:

If desired, work with your Faculty Affairs Liaisons to input effort percentages now.

[illegible]

Finance Committee

*Co-Chairs: Kathy McCarty, Shelly Terrazas,
Bob Currey, and Blake Waldrop*



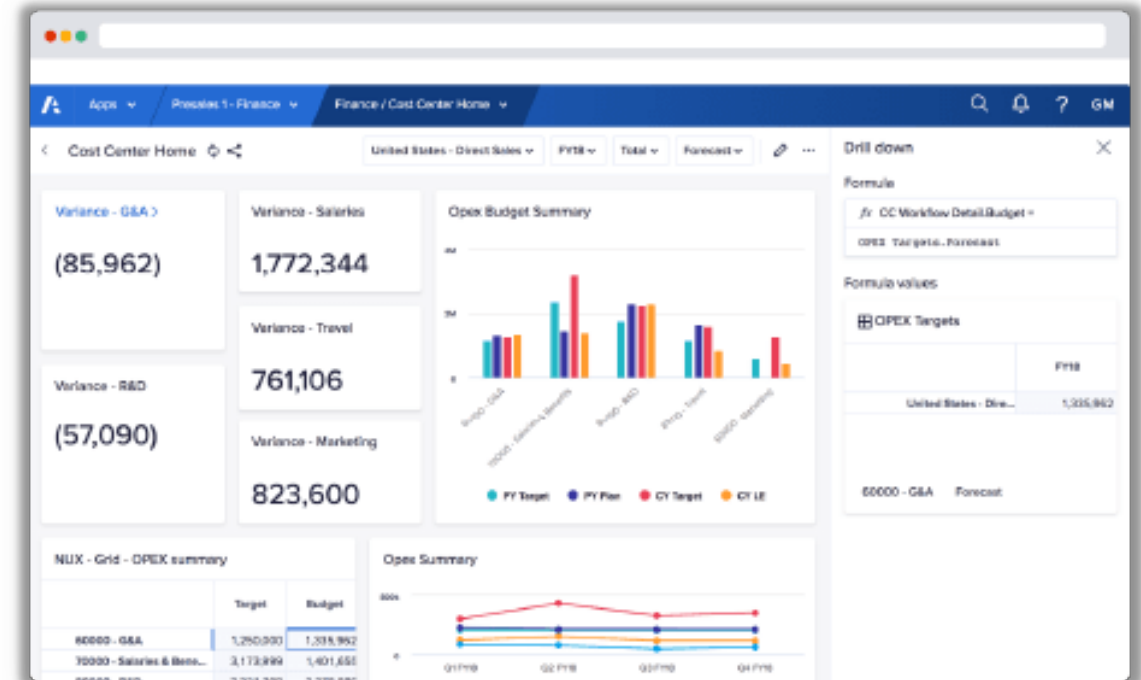
Update on new Budget System

Vendor selected

- New budget solution will be [Anaplan](#)
- Tru Ed consulting will be implementation partner
- Implementation timeline: 24 weeks
- More on timing and next steps soon

BSAG Request:

Stay tuned for updates on next steps.





Relocation Policy Changes

Lump Sum Relocation Reimbursements:

- Prior to 2018, Relocation Reimbursements were not taxable
 - *These payments were processed through AP and were subject to strict IRS regulations on what could be reimbursed*
- The Tax Cuts and Jobs Act of 2017 eliminated tax exempt Relocation Reimbursements
 - *These are now processed through Payroll and are not subject to the same IRS regulations*
- Due to these changes, the USG, along with several other intuitions, have switched to lump sum Relocation Reimbursements
 - *Changing our process would reduce administrative burden both centrally and for departments and employees because we would no longer need to track charges or receipts*
- This change would eliminate the Direct Bill Relocation Process
 - *Eliminating this process will lead to consistency and increased accuracy for all relocation reimbursements*

BSAG Request:

Please let us know if you have any questions or concerns with this new process.

Foundation Committee

Co-Chairs: Elizabeth Prince & Sadie Brown



Foundation Announcements

- Collaborative meeting for business and development officers scheduled for January 19, 8:30–10:30 at the Stelling Study
 - *Official invitation to come*
- Alcohol policy drafted and receiving comments
 - *Please contact Will Hearn at whearn@uga.edu if you would like to provide feedback*
- Assigning department number and program code to new funds
- Calendar year-end schedule

BSAG Request:

If desired, please provide feedback on the above.

Human Resources Committee

Co-Chairs: David Maddox & Chandra Echols



No planned HR topics this month

Any questions or ideas for the HR committee?

BSAG Request:

Please send any questions or requests to David Maddox and Chandra Echols, BSAG HR committee co-chairs.

Reporting Committee

Co-Chairs: Hailey Normandia & Josh Hanna



Microsoft Office 365 Upgrade

- EITS upgraded all active student and employee Microsoft licenses in the month of December

Power BI:

- UGA users can now access Power BI Pro which is a business intelligence tool



BSAG Request:

Please share this information with your team and be prepared for exciting developments with Power BI in 2024!



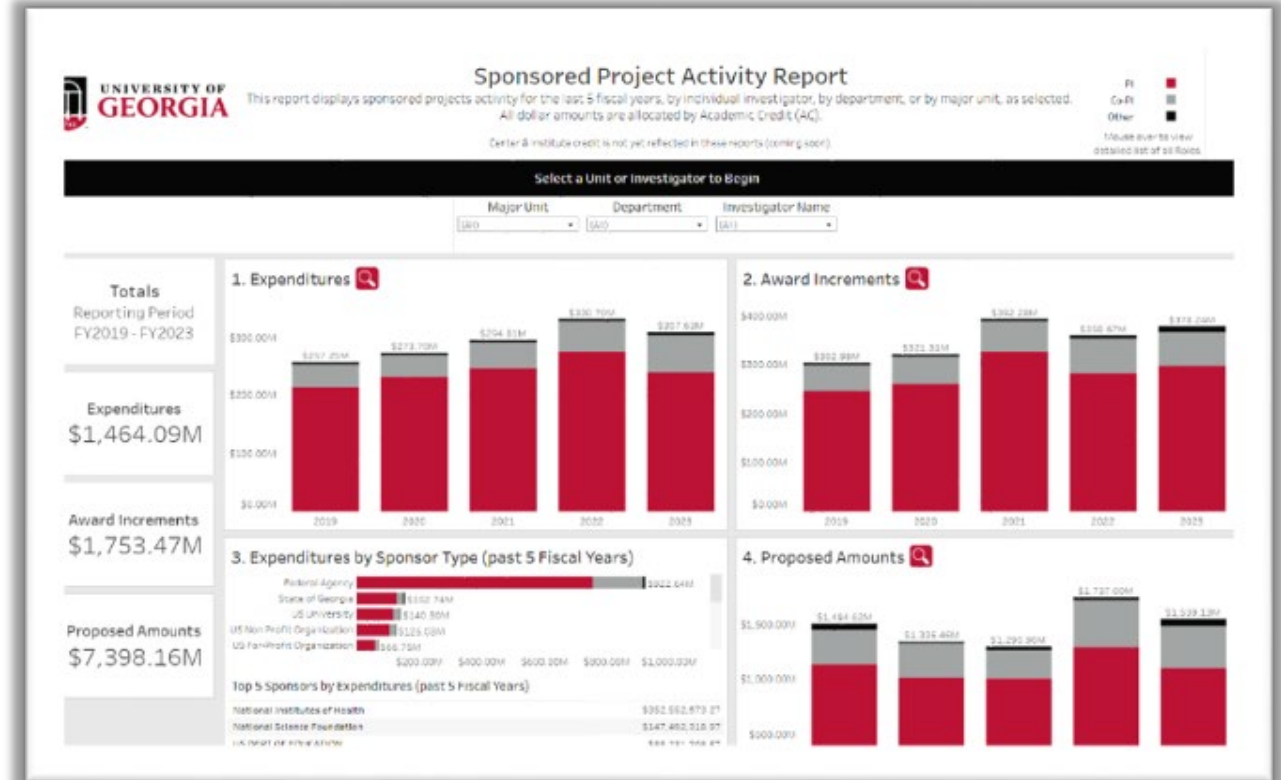
Sponsored Projects Reporting

NEW: Sponsored Project Activity Report (SPAR)

- This [new report](#) shows year-over-year proposal, award, and expenditure dollars by major unit, by department, or by investigator.
- Navigate to OIR's [Operational Reports](#) to view this report.
- All faculty have access to this report along with staff who have the data warehouse reporting role.

BSAG Request:

Please ensure that your deans and associate deans for research are aware of this new report.





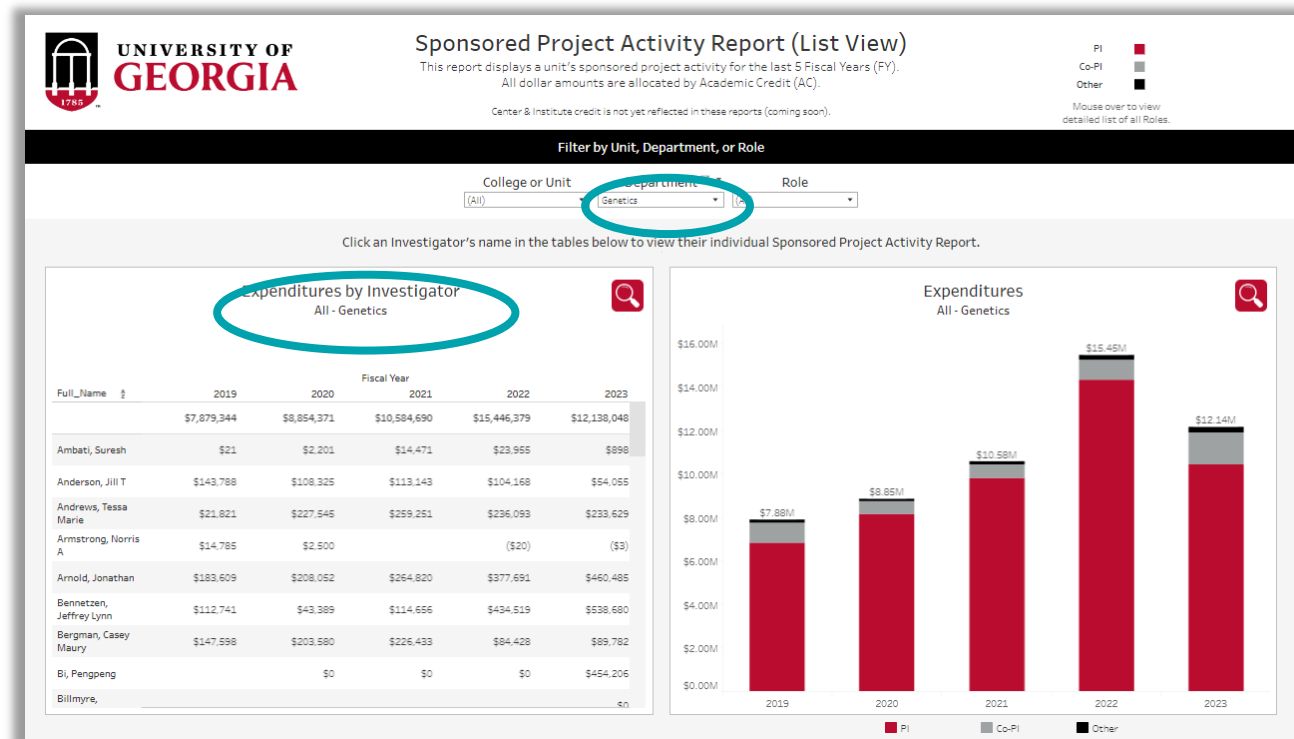
Sponsored Projects Reporting

NEW: SPAR List View

- This [draft report](#) allows you to select a unit and all investigators will be listed individually.
- Expenditures, Awards, and Proposals are all listed on the first page with the ability to drill down to details.

BSAG Request:

We hope to release this report in January. Please [let us know](#) if you'd like to see changes!





Sponsored Projects Reporting

PSR Lite Subscriptions

- Automatically email the pre-filtered report
- SPA subscribes the lead PI to all new awards since April 2022
- Monthly Training is available
 - January 18th @ 3:30
 - <https://spa.uga.edu/training-calendar/>

BSAG Request:

Encourage faculty to use this report to see their direct cost balance and review charges on their sponsored projects!

PSR LiteTransaction ListPayroll List

PSR Lite

Project: RUSAF000167440A - Nanoscopy of 2D/3D heterostruc
Date Range: 8/1/2023 - 7/31/2025
Project Manager: Abate, Yohannes (0297317)

PM Name

Abate, Yohannes (0297317)

Project ID Descr

RUSAF000167440A - Nanosco...

Project

A00 - I

Account Summary

| Proj Budget Type | Account Level 2 | Budget Amount | Encumbrance Amount | Actual Amount |
|------------------|---------------------------|---------------|--------------------|---------------|
| Sponsor Funded | Personal Services Expense | \$133,701.00 | \$80,659.27 | \$28,828.31 |
| | Travel | \$6,000.00 | \$0.00 | \$0.00 |
| | Op Supplies & Expenses | \$22,684.00 | \$859.50 | \$16,583.18 |
| | Subtotal | \$162,385.00 | \$81,518.77 | \$45,411.49 |

Transactions

[Go to Full Transaction List](#)

| Date | Vendor ID Name | PS Doc Descr |
|------------|--------------------------------------|---|
| 10/16/2023 | #NA | ONL - Online Journal Entry - to correct Fall 2023 grad stud |
| 10/13/2023 | 1000054982 - NORCADA INC | Sample Holder for Microscopy N |
| 10/13/2023 | 1000054982 - NORCADA INC | Shipping with FedEx Internatio |
| 10/5/2023 | #NA | PRE - Pre-approved by Central Office - FY24 Fall Student Health 2 |
| 9/29/2023 | #NA | PAY - Payroll Processing - Payroll Expense |
| 9/27/2023 | VN0003947 - JOHN S JAMES CO | ADD. SHIPPING NORCADA |
| 9/20/2023 | VN0002889 - UNITED PARCEL SERVICEUPS | to Prof Ramanat Rutgers Univ |

Payroll

[Go to Full Payroll Transaction List](#)

| Date | Name Emplid BadgeNo | Encumbrance Amount |
|------------|--|--------------------|
| 10/20/2023 | ABATE, YOHANNES (0297317 - 810747907) | \$10,363.80 |
| 10/20/2023 | ASJAD, MUHAMMAD (4064158 - 811627903) | \$5,456.80 |
| 10/20/2023 | GAMAGE, DON RUWAN SAMPATH (0214140 - 8107494.. | \$13,000.50 |



Collaborator Contribution

Collaborator Contribution

- Original approach to tie credit to IDC return was scrapped.
- New approach: Pls can attribute credit to HR departments with which they have an association (e.g., tenure home, admin post, HR department, etc.)
- This means Grants Portal will start collecting credit data by HR department rather than financial department.
- This means that, when these changes go into effect, these two queries will no longer work:

[UGA GM AWARDS BY CREDIT](#) and [UGA GM EXPEND BY CREDIT](#)

BSAG Request:

Please share any questions, comments, or concerns with Jill Tinch and Shawn Hill.



Graduate School



Graduate School

Benefits Chartstring improvements

In Progress: Allow GradStatus users to click a button to indicate that a graduate assistant's fringe benefits should be charged to the same chartstring as salary. In those scenarios, users will no longer need to input the benefits chartstrings into GradStatus. **This process improvement is expected to save UGA departments at least 350 hours per year.**

BSAG Request:

Please make your teams aware and send questions, concerns, or improvement ideas to Angela Jewell and Shawn Hill.

Should the student's fringe benefits (e.g., insurance) be paid from the same chartstring as his/her normal payroll?



Yes, use the same chartstring as the salary



No, use a different chartstring for fringe benefits



Graduate School

Ability to charge partial tuition

- **New:** Ability to charge partial tuition when a grad assistant has only a percentage of time in research. **Will allow UGA to recoup hundreds of thousands of dollars in annual tuition and unit to collect this tuition return.**

BSAG Request:

Please make your teams aware and send questions, concerns, or improvement ideas to Angela Jewell and Shawn Hill.

Will a percentage of this graduate assistant's time be spent conducting research?

Yes



No



Research %

* 75

(IF YES): What percentage of the graduate assistant's time will be research?

Note: Enter the percent time out of 100%. For example, if 5 hours out of 20 total hours scheduled are research, select 25%.

Submit This Request



Graduate School

Additional GradStatus Improvements

- **New:** Ability to replace tuition waivers, rather than 2 separate transactions to add/remove.
- **New:** Help me select the correct waiver code questions.

BSAG Request:

Please make your teams aware and send questions, concerns, or improvement ideas to Angela Jewell and Shawn Hill.

The screenshot shows the 'Delete' form for a graduate assistant. It includes fields for Name, UGA ID, Department, Residency, (Start) Term, and Current Attribute. A red callout '1' points to the 'Replace' button in the top right. A red callout '2' points to the 'Current Attribute' dropdown menu. A red callout '3' points to the 'New Attribute' dropdown menu. The form also includes a section for selecting the source of funding (tuition waiver) and a section for indicating the percentage of time spent conducting research. A 'Submit This Request' button is at the bottom right.

Form Fields and Callouts:

- Callout 1:** Points to the 'Replace' button in the top right corner.
- Callout 2:** Points to the 'Current Attribute' dropdown menu.
- Callout 3:** Points to the 'New Attribute' dropdown menu.

Form Content:

Name: Xiang, Ying (Format: Last, First Middle)
UGA ID: 8112345678 (No dashes allowed)
Department: Bioinformatics, Institute of (BINF)
Residency: Non Georgia Resident (N)
(Start) Term: 202308 - Fall 2023
Current Attribute: DPAS

Please discuss with the faculty member or individual who will supervise this graduate assistant to determine the source of funding. If this graduate assistant will split their effort among teaching, research, administration, use the waiver code that represents the majority of effort.

Select from the following:

- ☒ Student's tuition will be paid from a research grant or sponsored project.
- ☐ Student's tuition will be paid from a training grant.
- ☐ Student is working on a graduate fellowship.
- ☐ None of the above.

Click here for more information on how to select the correct waiver attribute.

Ultimately, departments are responsible for selecting the correct waiver attribute. The waiver code should represent the position that accounts for the majority of the graduate assistant's time. Based on your responses to the question above, it looks like the best option is:

New Attribute: RIAS
Project ID: RNSFX000147220A
Assistantship Type: GRA

Will a percentage of this graduate assistant's time be spent conducting research?

Yes ☒ **No** ☐
Research %: 75
(IF YES): What percentage of the graduate assistant's time will be research?
Note: Enter the percent time out of 100%. For example, if 5 hours out of 20 total hours scheduled are research, select 25%.

Submit This Request



Graduate School

Improved GA waiver compliance report

- [New report](#) available.
- More intuitive.
- Available on demand.
- New subscription process.

BSAG Request:

Please make your teams aware and send questions, concerns, or improvement ideas to Angela Jewell and Shawn Hill.

Office of

Institutional Research

UNIVERSITY OF GEORGIA

Graduate Assistant Tuition Wai...

Graduate Assistant Tuition Wai...

Graduate Assistant Tuition Waiver Compliance Report (Details)

RESET FILTERS

Dept Descr Group

Franklin

Department

(All)

Days Out of Compliance

0

71

Enrollment Requirement

(All)

Employment Requirement

(All)

Employment Requirement

Less than 13 18G hours

Working > 20 hrs Overall

Enrollment Requirement

Within Compliance

Position Details for Selected Student

Dept: Franklin-Biochemistry

Dept ID: H1000259

PayGroup Code: 18G

Position: 40033495

Hours: 20

Supervisor: Wood, Zachary Arthur

Supervisor Email: zaw@uga.edu

Dept: Franklin-Biochemistry

Dept ID: H1000259

PayGroup Code: 18G

Position: 40007430

Hours: 0.5

Supervisor: Sabatini, Robert S

Supervisor Email: ramu@uga.edu

Graduate Assistants Out of Compliance for Fall 2023

| Days Since OOC | Full Name | UGA ID | Emplid | Date Out of Compliance | Enrollment Requirement | Employment Requirement |
|----------------|------------------------------|-----------|---------|------------------------|---|---|
| 71 | Ross-Kemppinen, Nolan Samuel | 811788568 | 1820432 | 10/2/2023 | Within Compliance 18 Credit Hours Enrolled | Working > 20 hrs Overall 20.50 Hours Overall |
| 48 | Anil, Gayathri | 811583676 | 4044688 | 10/25/2023 | Within Compliance 16 Credit Hours Enrolled | Working > 20 hrs Overall 32.33 Hours Overall |
| | Begley, James | 811005089 | 4006858 | 10/25/2023 | Within Compliance 17 Credit Hours Enrolled | Working > 20 hrs Overall 20.42 Hours Overall |
| | Brewer, David Timothy | 811685298 | 4007808 | 10/25/2023 | Within Compliance 18 Credit Hours Enrolled | Less than 13 18G hours 8.24 Hours Overall |
| | Charania, Zainil | 811156457 | 4032650 | 10/25/2023 | Within Compliance 12 Credit Hours Enrolled | Working > 20 hrs Overall 20.54 Hours Overall |
| | Clay, Kendall Bleu | 811329670 | 1822992 | 10/25/2023 | Within Compliance 18 Credit Hours Enrolled | Working > 20 hrs Overall 27.46 Hours Overall |
| | Ford, Kathryn | 811292758 | 4026509 | 10/25/2023 | Within Compliance 12 Credit Hours Enrolled | Working > 20 hrs Overall 25.16 Hours Overall |



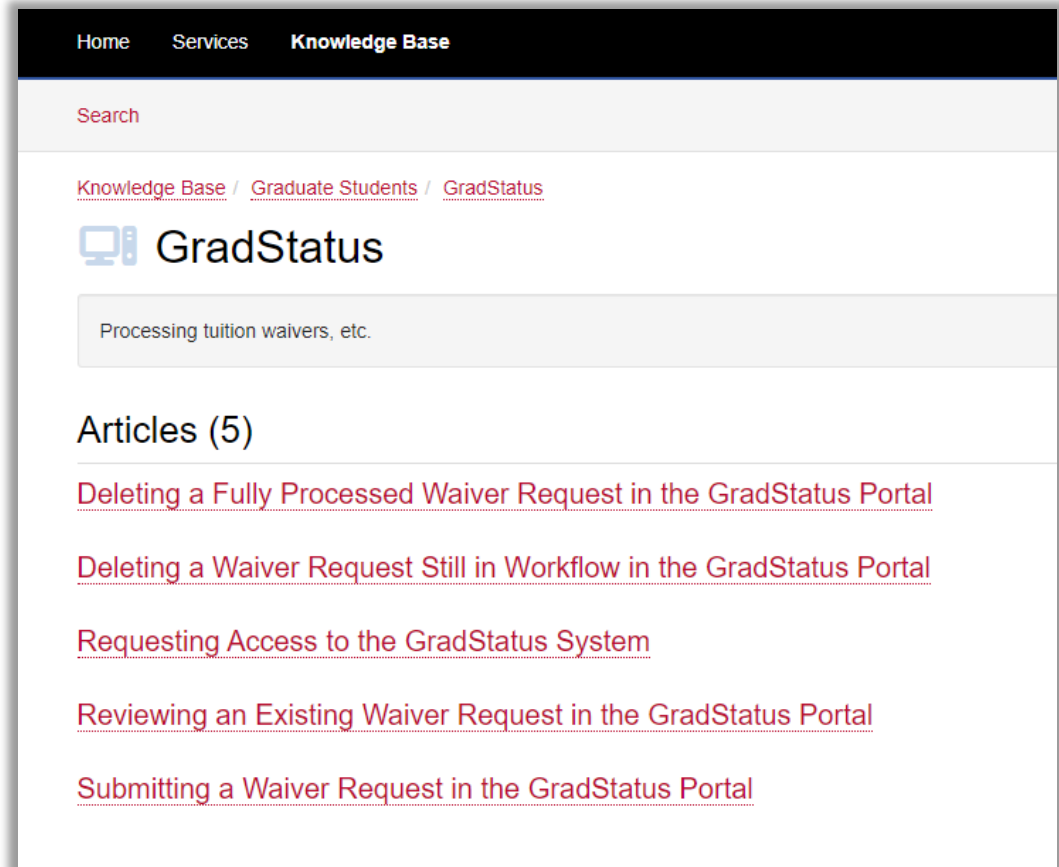
Graduate School

New knowledge base

For those who participate in business functions for graduate assistants, we are pleased to introduce a new [knowledge base](#), which includes searchable resources such as how to add, remove, or change a tuition waiver and how to request GTRIP tuition return.

BSAG Request:

Please make your teams aware and send questions, concerns, or improvement ideas to Angela Jewell and Shawn Hill.





Business Services Advisory Group

Finance & Administration

UNIVERSITY OF GEORGIA

Graduate School

New GradStatus Access Request form

There is a new [access request form](#) for those who need to request access to manage tuition waivers in the GradStatus system. This new process will save you time and eliminate the need for you to submit these requests via email moving forward.

BSAG Request:

Please make your teams aware and send questions, concerns, or improvement ideas to Angela Jewell and Shawn Hill.



UNIVERSITY OF
GEORGIA

GradStatus Access Request Form

Please submit this form to request access to the tuition waiver sections of the GradStatus portal. Your request will be routed to the Graduate School Finance team (gradfinance@uga.edu) for approval and provisioning. When access has been provisioned, you will receive a notification at the email address provided here.

Note: This is only to request access for tuition waivers. If you are a Graduate Coordinator or Graduate Coordinator Assistant who needs access to travel forms, please send an email to gradawards@uga.edu.

Requestor Email *

Please enter your email address here.

The individual you're requesting access for is: *

☐ Faculty ☒ Staff ☐ Student

I would like to: *

☒ Request Access ☐ Remove Access

REQUEST TO GRANT ACCESS TO GRADSTATUS

Please enter the information for the individual for whom access should be granted below.

Name *

Job Title *

Open Discussion

Next meeting:
**Feb 14 at 3pm –
location TBD**

View past meeting
materials on
the [BSAG website](#)

