

Meeting: Business Services Advisory Group

Date and time: Friday, June 26, 2015 1:30-3:00 p.m.

Location: MLC, Room 0213

- I. Welcome and announcements
  - A. Sarah Fraker welcomed the group and thanked them for coming to the meeting.
- II. Project Updates and Committee Reports
  - A. Crystal Rogers reported updates for the Other committee.
    1. **#44 – Streamline telephone work orders.** The committee sent out an email to BSAG on 5/26/2015. There has been no feedback and the committee requests that this be closed. For complete BSAG email [click here](#).
    2. **#70 – Delegation of \$ for faculty retention/counter offers to schools and colleges.** The committee sent out an email to BSAG on 5/13/2015. There has been no feedback and the committee requests that this be closed. For complete BSAG email [click here](#).
    3. **#56 – Information sharing with Deans and Department Heads.** Discussed at May 15<sup>th</sup> meeting. The committee sent out an email to BSAG on 5/28/2015. There has been no feedback and the committee requests that this be closed. For complete BSAG email [click here](#).
    4. **#87 – Classroom Equipment Purchases.** Kevin Burt discussed this at the Jan 9<sup>th</sup> meeting. The committee sent out an email to BSAG on 5/28/2015. There has been no feedback and the committee requests that this be closed. For complete BSAG email [click here](#). For Funding for Classroom Equipment Summary [click here](#).
    5. **#52 – Ability to view “Green Sheet” info on print jobs on-line.** Crystal Rogers reported that UBAS IT is modifying the Printing & Duplicating Job Request (green sheet) to enter an email address if they would like an emailed copy of the green sheet. Instructions for completing the job request will be updated to reflect an email address can be added for receipt of the green sheet. An IT programming request has also been made to modify the Central Duplicating System so that the email address will print on the green sheet.
  - B. Brett Jackson reported updates on the following suggestions from the Reporting Committee
    1. **#3 - Support documentation for Intra-University charges that is readily available to the department end user and #53 – Automatic charges to Department Accounts.** Brett Jackson requested that these two suggestions be combined. She indicated that the Reporting committee was working on a matrix to identify where source documents can be located for automatic charges from departments.
    2. **#1.1 – Improved viewing rights to see all sides of transactions** Lauren Holcomb from AIS reported on the Simpler System Pilot and data warehousing approaches. Initial pilot results show that Simpler is a query tool but not necessarily a “reporting” tool. There are merits to using Simpler however as it is web-based and has drill down capabilities. Simpler will continue to be evaluated for some data applications. A new URL will be established.

Supervisor's approval through Access Services will be required to access the system; however authorized users will be able to access all data that is made available to the Simpler tool. Emails will be sent to provide the new URL and explain how to access the system. EITS continues to investigate data warehousing solutions.

- C. Claire Boyd reported on Relocation Moving Services
  - 1. **#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.)** Claire reported that UGA has recently executed contracts with Armstrong Relocation and Graebel Moving Services. [Click here](#) for BSAG announcement. [Click here](#) for Relocation Moving Services Draft. These companies will direct bill UGA which will eliminate faculty/staff having to pay directly and seek reimbursement from UGA. These negotiations have also resulted in more competitive pricing on quality moving services. New faculty/staff or departmental staff will coordinate with Procurement for initial match. These companies have experience in moving labs. Additionally these companies have completed International moves.
- D. Jeanine Meeler reported on travel to foreign countries. She indicated her office must verify the status of travel warnings and security concerns for affected countries.
  - 1. **# 75 – T/A electronic Mods (Faculty, Staff, Student) Enforcement change regarding reimburse when TA completed after travel International Travel countries w/sanctions.** A new software system is being evaluated for the risk management of faculty, staff, and students in the event of natural disaster, severe violence, and health conditions to foreign countries. The system works with the TA system. When you click on Foreign Travel on the TA system you are sent to the *Terra Dotta* Software system to answer a questionnaire. The preparer will be directed back to the TA for completion once the questionnaire is completed. The system is user friendly and utilizes drop down boxes, yes/no, or you insert a phrase or one line on almost all the questions. This system can be used for both UGA and non-UGA individuals and makes the completion of a TA prior to travel even more important
- E. Jennifer Collins reported on several Travel committee and Purchasing and Payables committee suggestions:
  - 1. **#66 - Use Corporate travel cards for travel expenses.** There is only one state of Georgia (DOAS) recognized travel card arrangement with American Express. However, this is not a corporate card, it is an individual liability card. Currently DOAS will not allow state entities to have a corporate travel card program. To alleviate the financial burden on traveling employees, the committee is working on obtaining direct billing from hotels. To make employees more aware of hotels that accept direct billing, the committee can create a spreadsheet listing of direct bill hotels. Accounts Payable is also working with Global Escapes travel agency and a small pilot program is underway with Undergraduate Admissions. In this pilot, the travel agency arranges books the hotel and is able to obtain direct billing with UGA; however there is an additional fee for this service. The pilot will continue to be evaluated to see if this option is viable

UGA-wide. Additionally, the committee is further researching options with the current P-Card program with respect to travel expenses.

2. **#115 – It would be nice to have an account set up with Groome Transportation like you do with Enterprise and the travel agencies.** A direct billing option with Groome Transportation for shuttle services to and from the Atlanta airport has been established. For complete announcement [click here](#)
3. **#86 – Remove the Supervisor signature from the Travel Expense sheet.** This level of approval is already happening in echeck. If deemed internally necessary (maybe paid from another depts. accounts), the Dept Head could still initial or sign the paper form. An announcement was made to BSAG on June 24, 2015 recommending removal of the approval signature from the Travel Expense Statement. For complete BSAG announcement [click here](#). The committee is soliciting any feedback to this recommended change. The committee hopes that the solution to suggestion 9a. (electronic document work flow) will be useful in having Travel Expense Statements electronically routed for review, etc.
4. **#16 – Processes currently done on paper that should be electronic including: Travel Authorities and reimbursement requests.**
  - i. A redesigned Travel Expense Form is being reviewed by the IT department. After their review the Travel committee will send it out to BSAG members for review and feedback. This should occur in July.
  - ii. Information on Athens area hotels that will direct bill is being added to the Travel website.
  - iii. A travel Expo is being planned and is in the preliminary stages.
5. **#32 – Payments to non-UGA employees** An announcement was made to BSAG including a link to a proposed Non-Employee Payment Form. For complete BSAG announcement [click here](#). The form has been sent to IT. Once it is completed it will be sent to BSAG members for feedback.
6. **#54 – Check requested initiated by the department with an appropriate object code are changed during processing and later a JV is done to correct these creating more work.** Jennifer Collins reviewed this matter with staff and it appears to be primarily a training issue with new Accounts Payable staff. Jennifer has addressed this training within the department and asked if units were continuing to have issues with respect to this. As there were no additional comments from the BSAG members, the group agreed to mark this item complete. If issues are not completely resolved, this can be addressed.
7. **#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.) and #42 Pink check requests for RELOC Walk through since sensitive information in required documents. A new form to be used in UGAMart replacing the Pink “RELOC” check request is almost finished. It should be completed in July.
8. **#6 – Generate an appropriate P-card log acceptable to the state from Works.** Users will be able to produce an acceptable transaction log from two reports in the WORKS system. This option to produce an automated report may be used in lieu of a manual transaction log. An announcement to a larger audience

explaining the changes will be issued in the near future [click here](#). It was noted that the WORKS reports will not include items not yet submitted for payment (i.e. vendor has not shipped or processed payment). Units should be aware that the reports will therefore not include pending items where a manual log would. It was also noted that users must input the appropriate information in WORKS in order for the automated log to contain all the required elements.

- F. **#20 - Tracking student assistant/LBCLR designated employee's ACA related 1300 work hours procedures and policies.** Amy Thomas asked if there was a possibility of Kronos being updated to a later version. Her office recently met with Kronos and learned that a new Kronos version handles some of the ACA issues and might assist with several of the business process improvements that BSAG has on its list. Holley Schramski and Julie Camp will investigate and report back to the group.
  - G. **#117 - Close out On-line injury reporting system** Bill Cheesborough reported that In addition to the sessions conducted in April 2015, HR has an on-line guide set up on the injury reporting site, and will also provide training sessions tailored to campus groups as needed. For complete BSAG announcement [click here](#)
  - H. **#0 – Create an electronic system for entering and processing journal Vouchers.** Holley Schramski reported that the eJV system is being tested by several units. EITS is adding some functionality that will be needed on grant accounts. As soon as that is finished, the system will be available for use. An announcement will be made.
- III. Other Business
- A. Sarah Fraker reported on BSAG membership:
    - 1. Members of BSAG can nominate someone be added to the Listserv.
    - 2. A sign-in sheet will be circulated at the BSAG meetings.
    - 3. If a member is not able to attend a meeting, please send a representative from your area.
    - 4. Some of the BAAF planning committee members are rolling off. Co-chairs from this group are invited to stay as a BSAG members for 2 years.
  - B. It was suggested that meetings be moved to Wednesdays from 3:00-4:30. This will tentatively go into effect with the August meeting.