

Meeting: Business Services Advisory Group
Date and Time: Wednesday, August 9, 2017, 3:00 p.m. – 4:30 p.m.
Location: Miller Learning Center, Room 0348

I. Welcome and Announcements

- A. Bill Prigge welcomed the group and introduced Mica Turner as the new Chief Business Officer for the School of Ecology.
- B. **Business Services Advisory Group Guidelines and BSAG Co-Chairs Responsibilities Approval – Bill Prigge**
 - i. Bill Prigge reviewed the BSAG guidelines and Co-Chair responsibilities. The group was asked if any changes should be made to the BSAG guidelines or the Co-Chair responsibilities.
 - ii. As there was no objections/changes, the guidelines were approved.

II. Project Updates and Committee Reports

- A. **BSAG Project List Update – Bill Prigge ([Click here](#))**
 - i. Committee Co-Chairs have been busy reviewing the project list and updating items assigned to each of them.
- B. **Item #83 – Inventory Cost Threshold Update – Craig Mathews and Bill Cheesborough ([click here](#))**
 - i. Craig Mathews and Bill Cheesborough provided an update on the Inventory Threshold survey distributed to the campus community.
 - ii. The committee's recommendation was to move the threshold to \$1,000 (BOR threshold is \$3,000 and is used by all other USG research institutions). Craig provided the opportunity for anyone to voice any objections or feedback.
 - iii. Even with an increase in the threshold, units can still ask that items below the threshold be included on the inventory, tagged and tracked. Property Control will work with the OneSource project and others to develop processes/instructions for adding these items.
- C. **Items #22, 23, 29 & 116 Update – Teresa Taylor**
 - i. It was determined to place these items "On Hold" until PeopleSoft has been implemented.

III. Other Business

- A. **Simpler Update – Sarah Fraker**
 - i. Sarah offered to provide Simpler training to any individual units/colleges/schools as needed.
 - ii. Simpler will be one flavor of reporting available as a result of the PeopleSoft implementation.
 - iii. Position and salary classification has now been added to the system at this time.
 - iv. Departments are highly encouraged to start using Simpler now to assist with the transition from the mainframe to PeopleSoft. Simpler will be one of the "retained" tools; so knowledge of it and familiarity with it will facilitate a more seamless transition, with respect to query/reporting, for your organization.
- B. **Classification Procedures Update – Matthew Reiter and Parker Thomas ([Click here](#))**
 - i. The HR website now features classification resources. More information on the classification procedures can be found on the PowerPoint presentation included above.
- C. **FY2017 Over drafted Accounts – Ken McCollum**
 - i. Most units had enough funds to cover their over drafted accounts. Ken has reached out any unit who needed to return funds. If you were not contacted, there is no need to take any action.
- D. **PeopleSoft Finance Approval Concepts Overview – Chad Cleveland ([Click here](#))**
 - i. A small work group is needed to develop an institutional approach for transaction workflow approval.
 - ii. Bill Prigge, Bill Cheesborough, Sean Rogers, Melissa Hunter, Toni Rogers, Susan McCullough, John Varghese, Sheila Morgan, and Eric Matthews volunteered to serve on the work group.
 - iii. Sean was nominated to be the leader of the group. A decision on the institutional approach to these transaction thresholds will need to be made by September 1.
 - iv. This group's recommendation will be added to the business process design information (scheduled to be published on the OneSource website by the end of August) and will be part of the agenda for the September 22 Finance Business Process Design Forum.
- E. **OneSource Update – Holley Schramski & Stacey Boyles ([Click here](#))**

As there was no further business, the meeting was adjourned.

The next BSAG meeting will be Wednesday, October 4, from 3:00 p.m. – 4:30 p.m. in MLC 250

Please also save the date to attend the OneSource Finance Business Process Design Forum, Friday, September 22, from 8:30 a.m. – 11:30 a.m. in Georgia Center, Masters Hall.