**BSAG Meeting Minutes**

Wednesday, December 13, 2023

3:00 – 4:30 p.m.

Bolton Dining Commons, Hearth Room

**INTRODUCTION**

* Congratulations to Leah Walshe (Assistant CBO, College of Public Health) and Anjali Dougherty (CBO, Public Service and Outreach) for their new 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 UPDATES**

Dr. Tim Chester, Vice Chancellor for Information Technology (USG) and Vice President for Information Technology (UGA) provided an update on the Unified ERP project.

**ERP Current State**

* 3rd generation systems available through web browser.
* UGA had 3rd generation systems. They have 10 to 15-year shelf life typically.
* We are 6 years in at UGA. Several USG institutions are far longer.
* 4th generation systems are next.
* They are cloud based. No servers or data centers. They are designed for large, multi-subsidiary organizations like USG/UGA.
* Having all USG institutions in the same database makes analytics easier to collect.
* 3rd generation information takes longer to get the data collected.
* 4th generation systems are designed for mobile technology.
* 4th generation systems have a 20-year shelf life.
* The State of Georgia selected Workday with a 20-year contract, but USG is not committed to that selection.

**Why?**

Questions around longevity of the current ERP across the entire university system. Also, the fact that we recently went through this implementation will position us well for a 4th generation system implementation. This implementation will be a lot of work, no doubt, but it will be easier than our last ERP implementation because we are using packaged systems rather than transitioning from a fully homegrown system.

**How?**

1. *Assessment Phase/cataloging*. This is where we are now. Build set of requirements and select an implementation partner consulting firm. Funding stream needs to be approved by general assembly for this project to progress.
2. *Construction/Drawing Phase*. This will be a stakeholder-led design phase. They will take our specifications and configure the system.
3. *Implementation Phase*. System runs as built to run and data is being validated.

**Timeline**

We’re too early in the process to know our timeline. The State of Georgia is aiming to go live with Workday in April 2025. We are likely at least a year behind that, but there is too much uncertainty in the assessment phase to determine timing with any degree of certainty. More will be communicated as soon as we know more.

**Implementation Strategy**

For the last ERP implementation, the more complex R1 institutions were the last to implement. With this ERP implementation, the R1 institutions will be the first to implement. This will allow us to design the system around the more complex business requirements of these institutions.

**Nomenclature**

* “NextGen” Project: This refers to the State of Georgia’s ERP implementation of Workday.
* “Unified ERP” Project: This refers to the USG’s ERP implementation. The system still needs to be identified and the funding secured before this project will advance.

**FACULTY AFFAIRS COMMITTEE**

* In Spring 2024, all USG institutions will be required to report faculty annual evaluation scores (only scores, not narrative).
* We’ve designed a Smartsheet process to make this easier.
* Website: [Click here](https://onesource.uga.edu/resources/faculty_performance/)
* Recording of Faculty Affairs Liaisons Meeting: [Click here](https://kaltura.uga.edu/media/t/1_8a58g1t3)
* **Request**: Your Faculty Affairs Liaisons can update faculty effort percentages in the Smartsheet now. If you would like them to, please encourage them to do that now.
* **Question**: Will we be able to review the data after it’s entered? **Answer:** We do have views set up for Faculty Affairs Liaisons and have the ability to set up “delegates” by department. We expect there will be a review period for CBOs/HR Liaisons/FA Liaisons after all scores and effort percentages are entered before they are uploaded into OneUSG Connect.

**FINANCE COMMITTEE**

**New Budget Management System**

* New budget system has been selected: [Anaplan](https://www.anaplan.com/request-demo/?utm_source=google&utm_medium=paid_search&utm_campaign=fy24_q3_core_all&utm_term=anaplan&utm_content=amer_en-602979284367&gad_source=1&gclid=Cj0KCQiA7OqrBhD9ARIsAK3UXh3Gqsi2wHzTjvVnFqmQnNPHdi4zUzCEx9z4Ezpd6tcb5aimG5fObb8aAkzNEALw_wcB) (4th gen system)
* This will replace Hyperion.
* TruEd will be implementation consultant.
* Expected implementation timeline is 6 months, potentially go-live July 2024.

**Relocation Reimbursement Policy Change**

* Going to a lump sum model. So, no receipts involved.
* These would go through Payroll because relocation costs are taxable.

**Question**: Do you need to wait for the new hire to be an active employee to submit a relocation payment request to go on their paycheck? **Answer:** Yes, the employee will need to be active.

There were several questions and answers – good discussion – and these conversations will continue.

Effective date is not determined as of now. When this becomes effective, it will be forward looking. In other words, it will not apply retroactively to offer letters already issued. There will be more conversation with this group to determine the ideal timing of implementation.

Future requests will be tied to supplemental pay process. Direct bill process will be eliminated with this potential policy change.

**FOUNDATION COMMITTEE**

**Collaborative Meeting for Business & Development Officers**   
January 19, 8:30–10:30 a.m. at Stelling Study

**Alcohol Policy**

Working through a new Foundation alcohol policy and best practices. We’re still accepting comments on the draft. Please contact [Will Hearn](mailto:whearn@uga.edu) if you would like to provide feedback.

**Scholarships**  
Scholarships are not assigned chart strings like other funds. However, we do still need the department and program code, though. Development officers completing a new fund agreement now have the ability to add a business officer from their area to provide the department and program code in TeamDynamix. Once the development officer submits the TDx ticket, a workflow step will route to the named business officer for their comment. Please reach out to [ugafbusiness@uga.edu](mailto:ugafbusiness@uga.edu) with any questions.

**Calendar Year End Schedule**

Gift Accounting staff will be in One Press Place on Dec. 28 and 29. Calendar year end gifts can be received and processed there so that they do not have to sit in business offices over the holiday break. Business officers are encouraged to assist with forwarding any donations to One Press Place during the week of December 18 if development staff are out of office.

**HR COMMITTEE**

No updates

**REPORTING COMMITTEE**

**Power BI Pro**

Effective this month, UGA employees now have access to Power BI Pro in our Microsoft 365 licenses. Coupled with OIR’s commitment to make parts of the data warehouse available for ad hoc report development in 2024, this is an exciting development that can greatly accelerate our ability to leverage and analyze data, build dashboards, etc.

**New Sponsored Project Activity Report (SPAR)**

This [new report](https://data.oir.uga.edu/#/site/OIR/views/IndividualInvestigatorReportQAVers/SponsoredProjectActivityReport_1?:iid=1)shows year-over-year proposal, award, and expenditure dollars by major unit, by department, or by investigator. Navigate to OIR's [Operational Reports](https://oir.uga.edu/data/oper/research/) to view this report. ​All faculty have access to this report along with staff who have the data warehouse reporting role. Please ensure that your administrators, faculty, and staff are aware.

A screenshot of a computer screen

Description automatically generated

**Draft SPAR List View Report**

Similar to the above, this [draft List View report](https://data.oir.uga.edu/#/site/OIR/views/ResearchInvestigatorActivityReports/UnitInvestigatorReport?:iid=3) allows you to select a college or department and it shows individual rows for each faculty member who has been assigned academic credit on a sponsored project in that department. This was a request from the deans. Please review with your teams and [share feedback](https://app.smartsheet.com/b/form/753c3839ed5745f6ad8bf9a6295473c6) by early January if you’d like to see changes or if anything looks amiss.

A screenshot of a computer

Description automatically generated

**Project Status Report (PSR) Lite Subscriptions**

As a service to PIs and units, SPA continues to set up PSR Lite subscriptions that send snapshots of project balances to PIs monthly. This serves as a reminder about available budget and to have conversations with financial and research support staff on planned spending. These are like a bank statement – unencumbered expenses will not show, but it is a useful snapshot. Please encourage your faculty to use these and let us know if you have questions or concerns. There are monthly trainings on these reports that are open to faculty and staff. View trainings on the [SPA training calendar](https://spa.uga.edu/training-calendar/).

**Collaborator Contribution**

As we plan for the transition from academic credit to collaborator contribution, behind the scenes, the Grants Portal will switch from financial department to HR department. Investigators will only have options to select from a department where they have an official association (e.g., primary appointment, secondary appointment, HR department, admin post, etc.).

**Question**: Our faculty know their financial departments but do not know their HR departments. Will this cause confusion?

**Answer (not adequately covered in BSAG)**: The HR departments will be behind the scenes. What the faculty will actually see is the MIH Level 5 descriptions of the departments, or at least that is the plan. So, a FACS investigator would see one or more of the below options to select for credit. These are more “plain English” descriptions than both financial and HR departments that faculty should be familiar with.

A screenshot of a computer

Description automatically generated

**Question**: Will IDC return be affected?

**Answer**: No, IDC return will not be affected at all. Collaborator Contribution has been completed decoupled from IDC return thanks to the productive discussions with BSAG and other groups in the Spring and Summer.

**GRADUATE SCHOOL COMMITTEE**

Several new process improvements on the horizon or recently implemented. If you have questions, concerns, or comments on any of the below items, please contact Shawn Hill and Angela Jewell.

**Benefits Chartstrings**

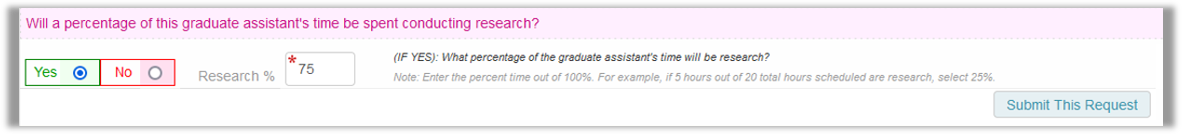
Currently, GradStatus users must enter a benefits chartstring. In the future, users will be able to check a box indicating whether benefits can be charged to the same chartstring as salary, in which case no chartstring will need to be entered. This is expected to save your teams at least 350 hours per year and reduce error rates.

A white background with black text

Description automatically generated

**Ability to charge partial tuition**

Soon, a new radio button will be available in GradStatus that allows the user to charge partial tuition when a grad assistant has only a percentage of time in research. This will allow UGA to recoup hundreds of thousands of dollars each year in tuition charges and will allow units to recoup up to 1.5x that amount in tuition return funds.



**Ability to replace a tuition waiver code rather than add/remove**

Currently, to change a tuition waiver code, users must process a transaction to remove the code. Then wait at least a day. Then process another transaction to add the new code. In the meantime, students will show balances on their student accounts and may receive notices that they owe money. Soon, users will have the ability to replace a tuition waiver code in GradStatus, rather than remove/add. This will save time and eliminate the period of time where students who a balance on their accounts.

**New help text to select the correct tuition waiver code**

Some users don’t know which tuition waiver codes to select. Soon, there will be a new “Help select waiver code” button, which shows plain English text that pre-populates what appears to be the best code.

A screenshot of a computer

Description automatically generated

**Improved GA waiver compliance report​**

[New report](https://data.oir.uga.edu/#/site/OIR/views/GraduateAssistantWaiverExceptionReport-OOC/GraduateAssistantTuitionWaiverComplianceReport) available. ​More intuitive. ​Available on demand. ​New subscription process. Color coded to easily find areas out of compliance.

A screenshot of a computer

Description automatically generated

**New Knowledge Base**

For those who participate in business functions for graduate assistants, we are pleased to introduce a [new knowledge base](https://uga.teamdynamix.com/TDClient/3109/FandA/KB/?CategoryID=24696), which includes searchable resources such as how to add, remove, or change a tuition waiver and how to request GTRIP tuition return.

**New GradStatus Access Request Form**

There is a new [access request form](https://app.smartsheet.com/b/form/11dec6d6f3544cd5afdb982f9056df69) 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.

A screenshot of a computer screen

Description automatically generated