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
Financial Systems
Student Information System

- Hosted by Vendor
- Hosted by USG
- Hosted by Institution
Degree Audit System

Hosted by Vendor

Hosted by USG

Hosted by Institution
Learning Management Systems

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

1 2 3 4 5 6

March 2022 April - May 2022 November 2022 December 2022 April 2023 July 2023

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 gather 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
- Integration Platform
- Integrated Development Platform
- TALENT MANAGEMENT
- GRANTS SPONSORED PROJECTS
- 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
Questions
Faculty Affairs Committee

Co-Chairs: Carly Surratt & Mike Gorman
Faculty Performance Management

New process for reporting faculty evaluation scores

- Reporting will begin in spring 2024.
- View [website](#) for details.
- Here's the [recording](#) of the October meeting with Faculty Affairs Liaisons.

BSAG Request:

If desired, work with your Faculty Affairs Liaisons to input effort percentages now.
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
  o Official invitation to come
• Alcohol policy drafted and receiving comments
  o 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
  o January 18th @ 3:30
  o 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!
Collaborator Contribution

- Original approach to tie credit to IDC return was scrapped.
- New approach: PIs 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 Tincher 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.
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.
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.
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.
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.
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.
Open Discussion
Next meeting:
Feb 14 at 3pm – location TBD

View past meeting materials on the BSAG website