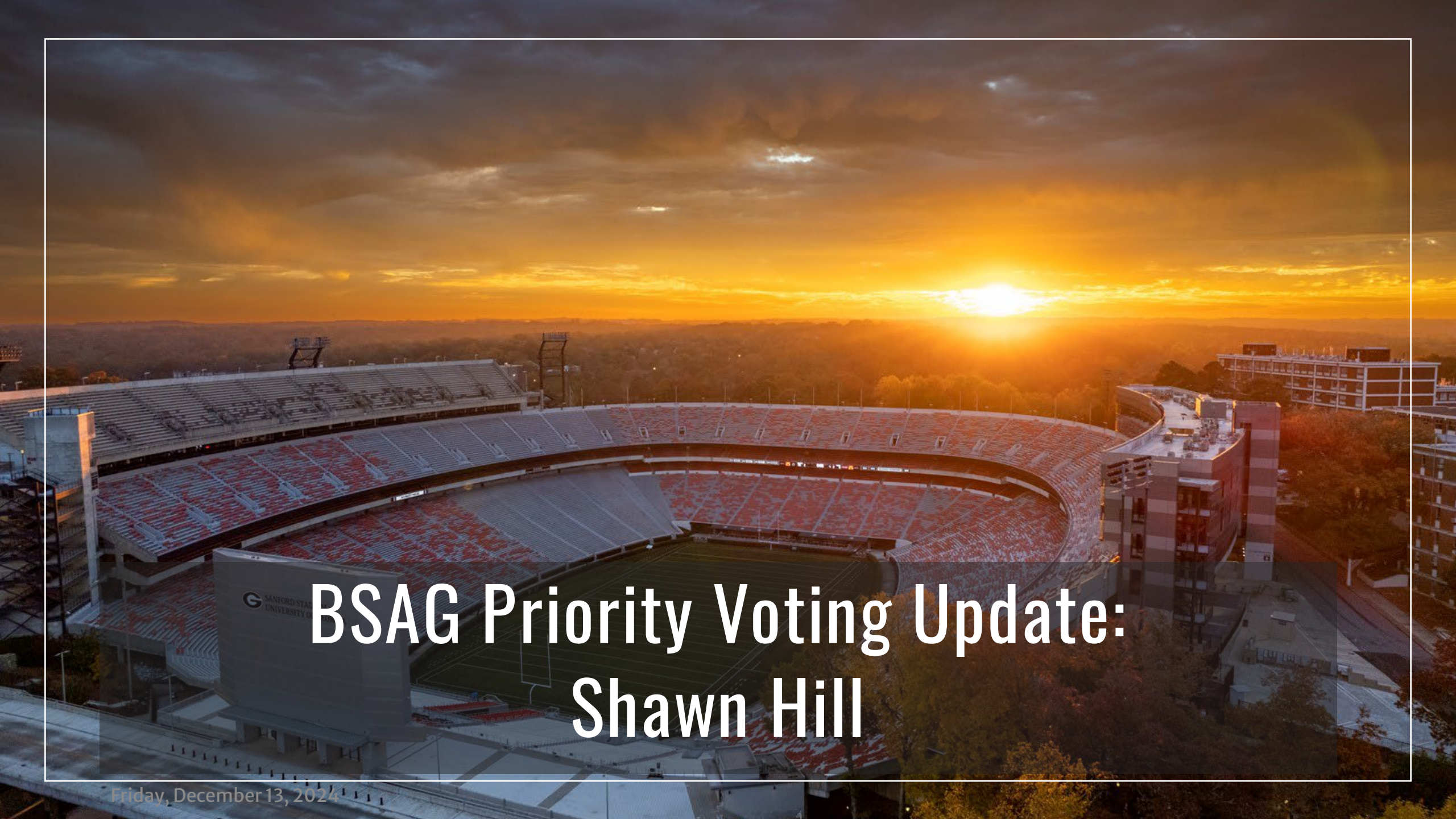


# Business Services Advisory Group







# BSAG Priority Voting Update: Shawn Hill

Friday, December 13, 2024





# BSAG Priority List Progress

Theme	Topic	Priority Score
HR Data & Position Mgmt	Status of HR actions	72
HR Data & Position Mgmt	HR: transparency into transaction statuses	60
HR Data & Position Mgmt	HR workflows, processing times, standardizing	45
HR Data & Position Mgmt	Position Mgmt: Allow users to see other units desc	43
HR Data & Position Mgmt	Position Mgmt: Develop hiring pool; internal temp	40
Process & Business Intelligence	Direct access to data to create reports	56
Process & Business Intelligence	Centralized team for process improvement	47
Process & Business Intelligence	System to prioritize HR/SPA transactions	42
Process & Business Intelligence	General: Improve system transparency (workflows)	42
Process & Business Intelligence	Central mechanism for policy change communication	41
Process & Business Intelligence	Consolidated reporting	40
Process & Business Intelligence	Define boundaries where units have policy authority	40
Training & Best Practices	Standardized trainings for Business & HR staff	57
Training & Best Practices	More Centralized Training	55
Training & Best Practices	Standardize best practices	48
Training & Best Practices	Build best practices before new ERP	43
Training & Best Practices	Develop data best practices	41
Training & Best Practices	Supervisor training; available and required for all supervisors	40







# RSA Dashboard: Laurel P & Chris A, University HR

Friday, December 13, 2024





# RSA Dashboard

## Key Takeaways

1. Huge thanks to our pilot testers for their feedback!
2. Looking for additional feedback
3. Use the RSA dynamic view to monitor the status of your compensation transactions. Feel free to submit feedback to [HRWeb@uga.edu](mailto:HRWeb@uga.edu).
4. **Requested Action: Share input when live in January.**

- **Planned Release:** Early to mid January 2025.
- **Processing Days:** UHR will explore adding a processing days column to the dynamic view. This should include definitions of what processing time means and the areas it may encompass.
- **Awaiting Information:** Statuses have been added to clarify what types of information are needed from the dept. Ex. Awaiting Dept – Analysis Questions or Awaiting Dept – Documentation Needed
- **Status Breakdown:** UHR will add a breakdown of the status in the description for the dynamic view, along with explanations of what the different colors represent.





# New Process Improvement Team: Shawn Hill

Friday, December 13, 2024





# New Process Improvement Team

## Key Takeaways

- Newly formed team will include Terri Akers and a dedicated Franklin College position as a pilot.
- Solutions will be shared across UGA wherever possible.
- Our quest for 1,000,000 hours saved has begun!
- **Requested Action: Let us know of automation opportunities.**





A large fountain with multiple jets of water spraying upwards is the central focus in the foreground. The water is clear and bright. In the background, a large, white, multi-story building with a dark roof and several dormer windows is visible. The building is surrounded by lush green trees and a well-maintained lawn. The sky is a clear, bright blue. The overall scene is a peaceful outdoor setting, likely on a university campus.

# Power BI for Reporting: Andrew Westbrook, OIR

Friday, December 13, 2024





# Power BI for Reporting

## Key Takeaways

1. [Microsoft's Power BI Training](#)
2. Refreshed look and feel for OIR Reports
3. Additional Self-Service Capabilities
4. **Requested Action: We will be looking for pilot testers in the near future**

- OIR is transitioning reporting tools from Tableau to Power BI
  - 1400 Reports currently on Tableau Server
- All faculty & staff have Power BI developer licenses through the EITS A5 Licensing
- OIR data will be available to designated users to build their own reports.

## Power BI Plan





A large fountain with multiple jets of water spraying upwards is the central focus in the foreground. The water is clear and bright. In the background, a large, white, multi-story building with a dark roof and several dormer windows is visible. The building is surrounded by lush green trees and a well-maintained lawn. The sky is a clear, bright blue. The overall scene is a peaceful campus setting.

# Financial Skills Training Ben Nunley, Finance Division

Friday, December 13, 2024





# Financial Skills Training

## Key Takeaways

- Finance will provide standardized trainings in PEP that can be used for new or existing business staff.
- We will develop a dashboard that shows “skills” attained across your organizations.
- **Requested Action:** If anyone would like to be a pilot testing group for this training, let us know.

Finance Division  
Finance & Administration  
UNIVERSITY OF GEORGIA

## Financial Skills Training: Travel at UGA

Begin

Security Check Point  
Gates M1-M21  
Free/Restaurants  
WHEELCHAIR AND EMPLOYEE  
TICKETED PASSENGER ONLY BEYOND THIS POINT  
THANK YOU





# Anaplan Implementation: Rachel C. & John G., Budget Office

Friday, December 13, 2024





# Anaplan Implementation

## Key Takeaways

1. Go-live in January 2025
2. System access and self-serve trainings in January
3. In-person trainings in February
4. System: Improved navigation and added functionality

- **January 2025:** The new Budget Management & Planning System will go live to campus in January 2025.
- **Jan. 15, 2025:** Users will be granted access to the system.
- **Jan. 15, 2025:** The knowledge base trainings will be available to campus.
- **February 2025:** In-person training sessions will begin in early February 2025.





Home page offers an organized layout that allows for easier navigation throughout the system.



UNIVERSITY OF GEORGIA

# Budget Planning and Salary Setting

Budget Allocation



Line Item Budgeting



Position Planning



Fringe Planning



Approval Workflow



Reporting



Credit Hour Allocations by Departm...

02.01b Credit Hour Allocations by Department

Lump Sum Salary Allocations by De...

02.05b Lump Sum Salary Allocations By Departments

Line-Item Budget Revenue

04.01 Line-Item Budget Revenue

Line-Item Budget Expense

04.02 Line-Item Budget Expense

Position Planning Roster

06.01 Position Planning Roster

Position Planning Roster - Vacant Po...

06.02 Position Planning Roster - Vacant Position

Review Position Roster by Comp Rate

06.03 Review Position Roster by Comp Rate

Review Funding Distribution

06.04 Review Funding Distribution

Edit Funding Distribution

06.05 Edit Funding Distribution

Position Planning Audit Report

Campus Fringe

07.03 Campus Fringe

Fringe Redirects

07.05 Fringe Redirects

Workflow Admin - Major Unit Revie...

08.00 Workflow Admin - Major Unit Reviewers

Workflow Proposed Budget Summary

08.02 Workflow Proposed Budget Summary

Workflow Dashboard - Line-Item Bu...

08.03 Workflow Dashboard - Line-Item Budget

Allocations Sheet Report

10.02 Allocations Sheet Report

Budget vs Allocations Report

10.03 Budget vs Allocations Report

Budgetary Detail Report

10.04 Budgetary Detail Report

Chartstring Budgets

10.05 Chartstring Budgets

Position Funding by HR Dept

10.06 Position Funding by HR Dept

Position Funding by Fin Dept

10.06 Position Funding by Fin Dept

Transfers



Campus Transfer Request

03.01 Campus Transfer Request





# Vacant position management now in the hands of campus units.

Apps | UGA Budget Development | 06. Position Planning / 06.02 Position Planning Roster - Vacant Positions

06.02 Position Planning Roster - Vacant Positions | Budget Development - PROD

Find...

	Include in budget?	Positions	Position FTE	Primary Component Rate Code	Start Date	Term Date	Budgeted Amount
40033153 -- VACANT	<input type="checkbox"/>	40033153 -- Senior Research Associate	1.00	Default NA Annual			-
40035839 -- VACANT	<input type="checkbox"/>	40035839 -- Post Doctoral Research Associa	1.00	Default NA Annual			-
40038321 -- VACANT	<input type="checkbox"/>	40038321 -- Assistant Systems Administrator	1.00	Default NA Hourly			-
40038988 -- VACANT	<input type="checkbox"/>	40038988 -- Senior Research Associate	1.00	Default NA Annual			-
40043457 -- VACANT	<input type="checkbox"/>	40043457 -- Post Doctoral Research Associa	1.00	Default NA Annual			-
40044129 -- VACANT	<input type="checkbox"/>	40044129 -- Research Professional	1.00	Default NA Annual			-
40044672 -- VACANT	<input type="checkbox"/>	40044672 -- Research Professional	1.00	Default NA Annual			-
40046086 -- VACANT	<input type="checkbox"/>	40046086 -- IT Professional	1.00	Default NA Annual			-
40046852 -- VACANT	<input type="checkbox"/>	40046852 -- Research Technician III	1.00	Default NA Hourly			-
40049125 -- VACANT	<input type="checkbox"/>	40049125 -- Post Doctoral Research Associa	1.00	Default NA Annual			-
40049761 -- VACANT	<input type="checkbox"/>	40049761 -- Post Doctoral Research Associa	1.00	Default NA Annual			-
40061263 -- VACANT	<input type="checkbox"/>	40061263 -- Post Doctoral Research Associate	1.00	Default NA Annual			-
40061352 -- VACANT	<input type="checkbox"/>	40061352 -- Post Doctoral Research Associate	1.00	Default NA Annual			-
40063006 -- VACANT	<input type="checkbox"/>	40063006 -- Systems Engineer and Linux Systems Admini...	1.00	Default NA Annual			-
11813459 -- VACANT	<input type="checkbox"/>	11813459 -- ASSOCIATE RESEARCH SCIENTIST	1.00	Default NA Annual			-
21007389 -- VACANT	<input type="checkbox"/>	21007389 -- Postdoctoral Research Associat	1.00	Default NA Annual			-
11813465 -- VACANT	<input type="checkbox"/>	11813465 -- ASSOCIATE RESEARCH SCIENTIST	1.00	Default NA Annual			-
40075896 -- VACANT	<input type="checkbox"/>	40075896 -- Professor	1.00	AYP Pav Freque...			-

Count 7 | Min 0.0 | Max 1.0 | Average 0.5 | Sum 1.0

**Include in Budget?** 11817403 -- VACANT

Emp Type: Salaried | Start Date: 07/01/2025 | Budgeted Amount: - | Combo Code: Find...

Dist %: 100.00% |  Include in Budget?

**Quick links**

- 06.01 Position Planning Roster
- 06.03 Review Position Roster by Comp Rate

**Additional insights**

**UNIVERSITY OF GEORGIA**

- Instructions
- Include in Budget?
- Add Vacant Position to Budget

11817403 -- VACANT

- Remove from Budget?

11817403 -- VACANT

Remove from Budget





# Position Funding report is now accessible by Financial Department.

Apps ▾ UGA Budget Development ▾ 10. Reporting / 10.06 Position Funding ▾

10.06 Position Funding Budget Development - PROD ▾

32--School of Public & Intl Affairs ▾ [Reset](#)

Find...

	Department	Fund	Class	Program	Account	Location (Operating Unit)	ChartField 1	Start Date	End Date	Budgeted Amount	Distribution %
32002PAY--CITS Salar...											
1832003BUL1001...	32003BUL--Charles B...	10500--Tuition	11800-Tuition	12400--Departmental...	522100 - Salaries-Staff			7/1/25		5,596	14.29%
11817618 -- Administ...											
32003BUL--Charles B...											
1832003PAY1004...	32003PAY--Political Sc...	10500--Tuition	11800-Tuition	11140--Instruction-De...	522100 - Salaries-Staff			7/1/25		54,860	100%
11813862 -- Adminis...											
1832003PAY1004...	32003PAY--Political Sc...	10500--Tuition	11800-Tuition	11140--Instruction-De...	522100 - Salaries-Staff			7/1/25		35,486	75%
11813864 -- Curricul...											
1832003PAY1007...	32003PAY--Political Sc...	10500--Tuition	11800-Tuition	15300--Student Serv...	521100 - Salaries-Profes...			7/1/25		29,355	50%
11813910 -- Graduat...											
1832003PAY1004...	32003PAY--Political Sc...	10500--Tuition	11800-Tuition	11140--Instruction-De...	522100 - Salaries-Staff			7/1/25		33,574	85.71%
11817618 -- Administ...											
1832003PAY1002...	32003PAY--Political Sc...	10500--Tuition	11800-Tuition	11100--General Acad...	511100 - Salaries-Regula...			7/1/25		53,386	47.5%
1832003PAY1012...	32003PAY--Political Sc...	10500--Tuition	11800-Tuition	14700--Acad Support...	511100 - Salaries-Regula...			7/1/25		5,620	5%
1832003PAY1005...	32003PAY--Political Sc...	10500--Tuition	11800-Tuition	12400--Departmental...	511100 - Salaries-Regula...			7/1/25		53,386	47.5%





**ClinCard:  
Kim Seabolt, Bursar & Treasury Svcs.**

Friday, December 13, 2024





# Background info on ClinCard

**What is it?** ClinCard is a reloadable, prepaid, Visa-branded physical or virtual card used to compensate human subjects. Since launching a pilot program, ClinCard has now supported:

**2,800+** human subjects

**80+** studies

**\$275K+** dispersed to human subjects

**160+** replacement cards have been issued (e.g., lost or stolen cards and deleted emails of virtual cards)







# Updates & FAQs

We are introducing improvements that align with feedback from faculty and researchers, ensuring a more user-friendly experience.

- Launching a New Informational Page
- Improvements with the website for a more streamlined process
- New one page job aids for both the participant and faculty/staff
- Bulk Load option piloting

**Q: If I have a submitted/approved protocol and informed consent which did not anticipate ClinCard usage, am I required to switch to ClinCard during the project period?**

**A: No.** You will not need to switch compensation methods during the project period. But, ClinCard should be used for future studies/protocols.





# Updates & FAQs

**Q: Is ClinCard the only available method for human subject compensation?**

**A:** ClinCard is designed to meet most human subject compensation requirements, regardless of the amount. The system offers several time-saving features, including milestone payment processing and bulk load options (currently in pilot), which streamline workflows and reduce administrative effort. However, we recognize that exceptional circumstances may require alternative solutions. To address this, we are working on enhancements to the application process to accommodate petty cash options for specific needs.









**Request: Is your unit willing to host a  
BSAG Meeting in 2025?**

Please email [shawnh@uga.edu](mailto:shawnh@uga.edu)





# Open Discussion

Friday, December 13, 2024



Next Meeting  
**Memorial Hall  
Ballroom,  
February 12 @3pm**

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

