



# Business Services Advisory Group





# Welcome and Announcements

- Congratulations – new positions, etc.
- Other announcements





A photograph of a campus scene featuring a black metal archway with two white globe lights. To the left is a stone pillar with steps leading up to it. In the background, there are large trees and a plaque that reads "UNIVERSITY OF GEORGIA". The sun is visible on the left, creating a lens flare effect.

# Reporting Committee Co-Chair Transition: Anjali Dougherty

Wednesday, June 11, 2025





# New Reporting Committee Co-Chairs

## Key Takeaways

- [Co-Chair Webpage](#)
- We sincerely thank Hailey Normandia & Josh Hanna for their exceptional leadership of [Reporting Liaisons](#) (BSAG's Reporting Committee) for the past few years. The group has grown to 150+ members under their leadership.
- Please welcome our new co-chairs, Jackie Byrd and Josh Haynes. Jackie and Josh have been active members of the reporting committee and will be excellent leaders to carry the torch.





An aerial photograph of a large, light-colored classical building with a prominent portico supported by several columns. The building is surrounded by lush green trees and other campus structures. In the foreground, a paved walkway leads towards the building, and a few people can be seen walking. The background shows more campus buildings and a distant city skyline.

# **UGA Foundation UGAF@Work Project Discussion: Elizabeth Prince, Will Hearn, David Manley**

Wednesday, June 11, 2025



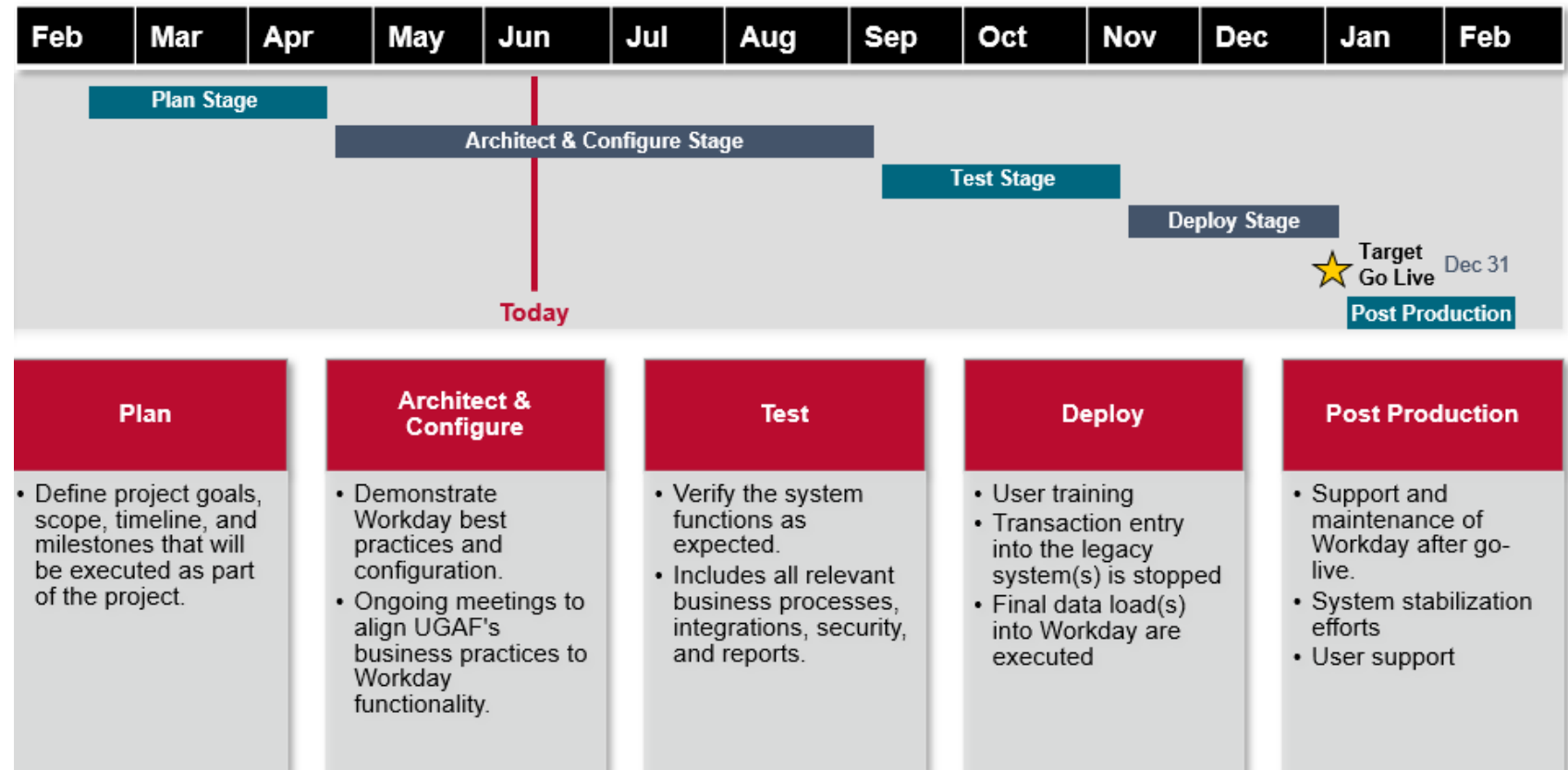


# UGAF@Work Key Points

## Key Takeaways

1. Visit the [UGAF@Work](#) project page for updates
2. System configuration underway. Opportunities to preview coming later this summer and fall
3. Staff will log in to submit expense reimbursements
4. Nominate a change network member [here](#)
5. Questions? Contact [UGAF.atwork@uga.edu](mailto:UGAF.atwork@uga.edu)

- Replacement of FAME by Workday underway as the **UGAF@Work** project
- Currently in **Architect & Configure** phase
- Target go-live of **Dec 31, 2025**



# UGAF@Work Overview

## What is UGAF@Work?

The UGA Foundation is implementing Workday to replace its current financial system, FAME, as part of its commitment to operational excellence and efficiency. The project is called UGAF@Work.

## Why Workday?

- **Outdated System:** FAME is an antiquated on-premise system with a poor user experience, requires inefficient workarounds, and creates organizational risk.
- **Modern Solution:** A cloud-based system like Workday enhances efficiency, user experience, and reduces institutional risk.
- **Robust selection process:** A cross functional team evaluated industry-leading enterprise software platforms, and after a thorough assessment, selected Workday as best suited for the Foundation's needs.

## Why now?

- **System Limitations:** FAME's dated architecture hinders updates and requires many inefficient workarounds.
- **Modern Platform:** The adoption of Workday aligns with UGAF's modernization efforts while offering better capabilities to integrate with other systems at the University.



# Benefits and Changes Ahead

## What's changing (and not changing)

This change will primarily affect individuals in financial roles within the Foundation. The project team is collaborating closely with these individuals to ensure they are well-prepared to use the new system and its processes. Many of these individuals are actively involved in the project.

Employees outside the Foundation, such as development officers, business officers, and other campus users, will be less impacted. **UGA employees will continue to use OneSource in the same capacity as they do today.**

While Foundation employees will experience the most significant changes, this transition will also affect:

- Anyone who currently uses FAME for reporting, such as accessing fund balances, budget activity, or endowed spending allocations
- Individuals who request expense reimbursements from the Foundation
- Anyone who submits contracts or invoices to the Foundation
- Anyone who accesses Fund Agreements via FAME





# UGAF@Work Upcoming Dates of Interest

Activity	Start Date	End Date	What & Why You Should Know
<b>Change Network Recruiting</b>	<b>5/26</b>	<b>6/18</b>	Get this group's support in nominating strong candidates to join change network
<b>Customer Confirmation Sessions</b>	<b>7/28</b>	<b>8/8</b>	Configuration largely complete Begin previews after CCS (demos, roadshows, etc.)
<b>End-to-End Testing (Integrations, Reports, &amp; Functional)</b>	<b>9/8</b>	<b>10/24</b>	Awareness of the extent to which system will be tested
<b>Workday Experience Sessions</b>	<b>10/27</b>	<b>10/31</b>	Opportunity for some users to get hands-on in system and practice future state processes





# UGA Foundation Expense Reimbursement Overview

## Summary of Change

Employees who have expense reimbursements from the Foundation will sign into Workday to use the self-service expense module to submit their expenses and update their banking information.

- Delegation will still be available for expense report creation, but individuals will need to sign in to submit
- Approvals will be conducted in Workday
- Reimbursements will be processed via ACH – employees will need to enter banking info into Workday
- Further details will be forthcoming

## Key Benefits

- Visibility & Transparency
- User Experience
  - Intuitive expense report module
  - Approval workflows and system validations
  - Security – only the employee will see their bank account info
- Audit – employee submission captures attestation
- Support – fewer external processes
- Reporting – captures expense types





# Identifying Individuals for Cost Centers for Approvals

The UGAF@Work team will be conducting an effort to identify the appropriate Cost Center Manager(s) for approval workflows.

## Some background on Cost Centers

- A Cost Center in Workday **identifies a unit (such as a department or section) responsible for managing a subset of revenues and/or expenses.**
- Will be used for approvals, workflow routing, and reporting
- Will initially be defined based on MIH
  - Cost Centers will have a Cost Center Manager assigned to them
  - UGAF@Work team will contact individuals if any missing cost center managers
  - We will develop and socialize the process for updates or changes to cost center managers





# UGAF@Work Change Network

## What is the UGAF@Work Change Network?

- The UGAF@Work Change Network is a diverse group of stakeholders who will receive regular updates and provide valuable feedback throughout the project
- This network serves as a vital communication bridge between the project team and the broader UGA and Foundation communities

## Who is part of the Change Network?

- The network is composed of selected representatives from stakeholder groups impacted by the project
- Members are nominated by their leaders
- They are typically influential, proactive, and open to change
- These individuals will act as change agents within their respective areas

## How will this support UGA and the Foundation?

- The Change Network will play a key role in preparing UGA and the Foundation for the Workday implementation by:
  - Sharing important project updates and messages
  - Reviewing and validating support materials
  - Providing timely and constructive feedback to the project team

## What are the next steps?

- If you would like to nominate someone, please [submit their names in this Form](#) by June 18
- A kickoff call will be held in July, followed by monthly meetings through project go-live





# UGAF@Work Update

## Key Takeaways

1. Visit the [UGAF@Work](#) project page for updates
  2. System configuration underway. Opportunities to preview coming later this summer and fall
  3. Staff will log in to submit expense reimbursements
  4. Nominate a change network member [here](#)
  5. Questions? Contact [UGAF.atwork@uga.edu](mailto:UGAF.atwork@uga.edu)
- The [UGAF@Work project page](#) has been updated with new updates, reference materials, and our project contact information.
  - Please reach out with any suggestions or requests so we can ensure our page is providing beneficial information
  - **Questions or feedback can be** sent to us at [ugaf.atwork@uga.edu](mailto:ugaf.atwork@uga.edu).



An aerial photograph of Sanford Stadium at the University of Georgia during sunset. The stadium is filled with red seats, and the sun is low on the horizon, casting a warm orange glow over the scene. The sky is filled with dramatic, dark clouds. In the foreground, a building with the University of Georgia logo is visible.

# **Bulldog Print + Design: Dwayne Weaver, Tonya Seay, Ronda Parr**

Wednesday, June 11, 2025





# Bulldog Print + Design Digital Storefront

## Key Takeaways

1. New Storefront July 1
2. Benefits of the new storefront
3. Current job request forms will no longer be available
4. Register in advance



| [HOW TO Guide to Ordering](#) | [Artwork Tips](#) | [UGA Branding Guidelines](#) |



### PRINT & COPY

**Color / Black & White**

- Basic Copies
- Carbonless Forms
- Flyers
- Small Posters
- Table Tents
- Postcards
- Brochures
- Booklets
- Programs
- Coll Bound Books
- Binders/Tabs
- ...and more!

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### LARGE FORMAT

- Large Posters
- Retractable Banners
- Vinyl Banners
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- Coroplast Signs
- Foamcore Signs
- Custom Stickers
- ...and more!

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### SPECIALTY ITEMS

- Buttons
- Pocket Folders
- Door Hangers
- Magnets
- Magnetic Name Tags
- Tablecloths
- Hairy Dawg Cutout
- ...and more!

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### BUSINESS CARDS

UNIVERSITY OF GEORGIA.

All Departmental Business Cards

\*Branding Standards Apply

[Order Now](#)



### STATIONERY

UNIVERSITY OF GEORGIA.

All Departmental Letterhead / Stationery

\*Branding Standards Apply

[Order Now](#)



### ENVELOPES

UNIVERSITY OF GEORGIA.

All Departmental Envelopes

\*Branding Standards Apply

[Order Now](#)



### STORE PRODUCTS

- Copy Paper
- Certificate Holders
- UGA Pocket Folder
- Campus Mail Envelopes
- Emergency Response Guide

[Shop Now](#)



### GRAPHIC DESIGN

Print & Digital Designs

- Logos
- Custom Stickers
- Brochures
- Magazines
- Newsletters
- Booklets
- Event Programs
- Calendars
- Banners
- ...and more!

[START A PROJECT](#)





# New Digital Storefront: July 1, 2025

## Key Takeaways

### 1. New Storefront July 1

2. Benefits of the new storefront

3. Current job request forms will no longer be available

### 4. Register in advance

- New digital storefront will launch on July 1st
- Benefits of the New Storefront
  - Track your orders from start to finish
  - Streamlined ordering process
  - Online visual guides & print tips
  - Business card & stationery ordering made easier
  - The Bulldog Print + Design punchout inside UGAmart will be discontinued.
    - The punchout items will now be located in the Store section of the Storefront.
  - Reorder jobs in just a few clicks!



# New Digital Storefront: July 1, 2025

## Key Takeaways

1. **New Storefront July 1**
2. Benefits of the new storefront
3. Current job request forms will no longer be available
4. **Register in advance**

- Current job request forms **will no longer be available** as of July 1
  - Qualtrics form & job request form
  - Downloaded PDFs (stationary order forms, etc.)
- **Register in advance**
  - Registration Link: <https://bpd.uga.edu/psp/app/>
  - Anyone with a UGA MyID can apply for access to the new storefront
- To learn more, visit our [website](#) or contact us at 706-542-4440 or at [printing@uga.edu](mailto:printing@uga.edu)

The screenshot shows the top of the 'Bulldog Print + Design' website. In the top right corner, a 'Log In' button is circled in red. Below the header, there are two columns of instructions. The left column is for 'UGA CUSTOMERS' and includes a red asterisked note: '\* Using a Chartstring or Speedtype'. It lists three steps: selecting the 'Login Using Your UGA Account' option, authenticating with a username and password, and saving the site for first-time users. A 'Login Using Your UGA Account' button is at the bottom. The right column is for 'NON-UGA CUSTOMERS: (Business Use Only)' and includes a red asterisked note: '\* Paying by Check or Money Order'. It lists three steps: selecting the 'Non-UGA Account' option, following instructions, and saving the site for first-time users. A 'Non-UGA Account' button is at the bottom.

**Bulldog Print + Design** Contact Us

**UGA CUSTOMERS:**

\* Using a Chartstring or Speedtype

- Select the "Login Using Your UGA Account" option
- Authenticate your username and password
- First-time users, select your site and save. You will be notified once your account has been approved.

Login Using Your UGA Account

**NON-UGA CUSTOMERS: (Business Use Only)**

\* Paying by Check or Money Order

- Select the "Non-UGA Account" option
- Follow instructions
- First-time users, select your site and save. You will be notified once your account has been approved.

Non-UGA Account



A photograph of a campus scene featuring a black metal archway with three columns and a stone pillar. The archway has a plaque that reads "UNIVERSITY OF GEORGIA". The background is filled with lush green trees, and the sun is visible on the left, creating a lens flare. A semi-transparent dark grey box is overlaid on the lower half of the image, containing the title text.

# **Gemini and NotebookLM: Justin Sackett and Bret Jamieson**

Wednesday, June 11, 2025





# Google Gemini

- Chat-based assistant
- Generates text, code, visuals
- Built into G Suite (Google Workspace)
- Data protection
- Visit <https://gemini.google.com> and log in with your [myid@uga.edu](mailto:myid@uga.edu) address.







# Google NotebookLM

- Your “AI-Powered Research Assistant”
- Designed to help you understand, summarize, and find information within documents you upload.
- Source based responses
- Data protection
- Visit <https://notebooklm.google.com> and log in with your [myid@uga.edu](mailto:myid@uga.edu) address.



# NotebookLM



**Business Services Advisory Group**

*Finance & Administration*

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# **Gemini & NotebookLM Demonstration**

<https://gemini.google.com/>  
<https://notebooklm.google.com/>



**Business Services Advisory Group**

*Finance & Administration*

**UNIVERSITY OF GEORGIA**

**Q&A**





**Business Services Advisory Group**

*Finance & Administration*

**UNIVERSITY OF GEORGIA**

# Thank you!

For more information,  
visit our Knowledge Base at [eithelpdesk.uga.edu](https://eithelpdesk.uga.edu)  
and search 'Gemini' or 'NotebookLM'.

Contact Justin Sackett at [justin.sackett@uga.edu](mailto:justin.sackett@uga.edu).

A large, multi-tiered fountain with water spraying upwards is the central focus in the foreground. In the background, a large, white, three-story building with a dark roof and multiple windows is visible. The building is surrounded by lush green trees and a well-maintained lawn. The sky is clear and blue.

# **Insurance & Claims Management: Adam Fouche**

Wednesday, June 11, 2025

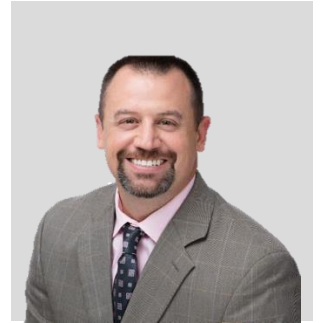




# Insurance Coverage for Volunteers

## Key Takeaways

- Dustin Chitwood, Director of Insurance & Claims Management
  - [General Liability – Volunteers](#)
  - Updated Smartsheet process will be replacing the Volunteer Agreement form soon.
  - For larger volunteer programs, create a policy document outlining the volunteer duties and how it benefits UGA.
- **Self-Insured Coverage:** UGA is self-insured through the Department of Administrative Services – Risk Management Services for state tort claims.
  - **Volunteer Coverage:** Liability protection extends to volunteers in structured, university-directed programs.
  - **Scope of Coverage:** Applies only when volunteers act within the scope of their official duties; deviations are not covered.
  - **Eligibility Requirements:**
    - Must provide proof of identity and legal residency.
    - Temporary visa holders cannot volunteer in roles where others are paid.
    - Under-18 volunteers require parental consent.
  - **Volunteers and Driving:**
    - Must be 18 or older and complete the motor vehicle use policy training.
  - **Compliance & Documentation:**
    - Background checks are required for those working with minors.
    - Updated process coming soon for the Volunteer Agreement Insuring Volunteers at UGA form.
      - This process is moving to Smartsheets.
      - Groups that use a lot of volunteers should consider creating a policy document outlining specifically their volunteer duties, how they will be directed/under the control of UGA employees, and how their duties will benefit UGA – will make the approval process on the insurance side quicker for the units. These documents can be submitted along with the Volunteer Agreement form.





A photograph of a campus scene. In the foreground, a large, circular fountain with multiple jets of water spraying upwards. Behind the fountain is a well-maintained green lawn. In the background, a large, light-colored building with a dark roof and several dormer windows. The building is surrounded by lush green trees. The sky is clear and blue.

# **PCard Policy Update: Bob Currey**

Wednesday, June 11, 2025





# New PCard policy effective July 1, 2025

## Key Takeaways

1. Includes recent updates from DOAS and USG
  2. Policy document has been streamlined to better align with DOAS & USG policies
  3. Key (non-policy) resources from old policy shifted to procurement website
  4. Training for cardholders and approvers being finalized. Please encourage staff to attend when available.
- Multiple recent policy updates from DOAS drove the need to update UGA's PCard Plan and Policy document
  - Received approval of revised PCard plan from DOAS, USG and UGA President's Office in October 2024
  - Updates to the policy required review and alignment of over 900 policy elements between DOAS, USG and UGA
  - Policy under review by UGA leadership with expected effective date of July 1, 2025.



# Key Changes

- Formalizes CBO role as approver for new card and renewal requests
- Eliminates need for Approver 1 to enter comments on all transactions prior to completing monthly reconciliation
- Shifts several non-policy resources/procedures from policy document to new Procurement Resource pages creating opportunity for quicker updates

Appendix 3: Procedures

Procedures	Description	Location
<a href="#">Background and Checks</a>	Outlines the process for background and credit checks for new PCards and PCard renewals.	Procurement Resources website.
<a href="#">Cancelling a PCard</a>	Lists the steps for cancelling a card when employment is terminated or the employee transfers to another department.	Procurement Resources website.
<a href="#">Disputing Transactions</a>	Outlines the steps to take to dispute transactions with the Bank.	Procurement Resources website.
<a href="#">Exception Requests</a>	Outlines the process for requesting exceptions to policies and temporary changes to spending limits (within or exceeding UGA's delegated authority).	Procurement Resources website.
<a href="#">Identifying, Reporting, and Documenting Actual/Potential Cardholder Abuse/Misuse</a>	Outlines ongoing monitoring efforts, as well as the steps for various situations involving internal/external fraud, waste, abuse, and misuse.	Procurement Resources website.
<a href="#">Lost or Stolen PCards</a>	Outlines the steps to report a lost or stolen card, or fraudulent use of the card.	Procurement Resources website.
<a href="#">Minimum Use Justification</a>	Outlines the steps for reviewing, requesting, and submitting justification for cards that have had minimal use.	Procurement Resources website.
<a href="#">Monthly Reconciliation Process</a>	Outlines the process for monthly reconciliation and the package requirements.	Procurement Resources website.
<a href="#">New Card Request</a>	Outlines the process for becoming a new Cardholder and/or obtaining a new PCard.	Procurement Resources website.
<a href="#">PCard Change Request</a>	Outlines the process for making changes to the Cardholder profile, including default Speedtypes, Cardholder name, permanently lower spending limit(s), permanent role assignments, and temporary role assignments.	Procurement Resources website.
<a href="#">Providing Sales Tax Exemption Form</a>	Describes how to obtain the sales tax exemption form for UGA and when to use this form when transacting with vendors.	Procurement Resources website.
<a href="#">Sign-off</a>	Outlines process for required <a href="#">sign-offs</a> of the transactions in Bank of America Works.	Procurement Resources website.
<a href="#">UGA-specific Training + Refresher Training at least annually</a>	Resource for training course and the Purchasing Card Exam.	Procurement Resources website.
<b>Non-Compliance Management</b>	Outlines the non-compliance points system and the actions that may be needed for instances of confirmed non-compliance.	Appendix 4





# Key Changes

- During PCard Plan review, DOAS and USG pressed for improved non-compliance language
- New points-based system takes into account cardholders compliance history and type of non-compliance event when assigning consequences
- Points are evaluated on a rolling 24-month basis

**Procedural:** Failure to follow established procedures related to use of the PCard. These may include administrative or clerical errors.

**Misuse:** Use of the card for legitimate purchases but for goods or services that are prohibited by State or internal policy (e.g., purchase of fuel for a State vehicle, accidental use of card for personal purchases).

**Abuse:** Use of the card for non-State business use purchases (e.g., intentional use of card for personal purchases).

**Fraud:** Wrongful or criminal deception intended to result in financial or personal gain. May involve intentional abuse of card but could include other forms of fraud.

Non-Compliance Type	1st Occurrence	2nd Occurrence	3rd Occurrence
Procedural	0	1	2
Misuse	2	3	4
Abuse	Immediate suspension of card and investigation of event.	Immediate suspension of card and investigation of event.	Immediate suspension of card and investigation of event.
Fraud	Immediate suspension of card and investigation of event.	Immediate suspension of card and investigation of event.	Immediate suspension of card and investigation of event.

Points	Notification	Training	PCard Access
0 to 1	Written warning	No impact	No impact
2 to 4	Notice of non-compliance	No impact	No impact
5 to 7	Notice of non-compliance	Cardholder repeats PCard training	Suspension of PCard for 2 weeks (and re-training complete)
Over 7	Notice of non-compliance	Cardholder repeats PCard training If needed, Approver(s) repeat PCard training	Suspension of PCard for a minimum of 60 days (and re-training complete)
Abuse or Fraud	Notice of non-compliance  Notice of suspension  Notify Internal Audit (IA) and State PCard Program Manager.  IA notifies USG System Office	Cardholder repeats PCard training  If needed, Approver(s) repeat PCard training	Immediate suspension of PCard pending results of Internal Audit investigation.  If Abuse or Fraud is confirmed, potential consequences include: - Extended suspension - Permanent cancellation of PCard privileges - Termination of employment - Criminal penalties



- Communication to PCard Listserv week of 6/23 with link to Procurement Resource page and new policy
- Campus communication via 6/26 Status Call
- Breakout Session after 7/17 Status Call
- Updated forms and training complete no later than 8/15





An aerial photograph of Sanford Stadium at the University of Georgia during sunset. The stadium is filled with red seats, and the field is visible in the center. The sun is low on the horizon, creating a warm orange glow across the sky and the surrounding landscape. The stadium's architecture, including the large scoreboard on the left, is visible. The text "Open Discussion" is overlaid in the center of the image.

# Open Discussion

Wednesday, June 11, 2025



# Next Meeting

State Botanical  
Garden: Porcelain  
and Decorative  
Arts Museum,  
August 13 @3pm

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

