

## **BSAG Minutes**

Wednesday, July 15, 2020

Zoom Webinar

3:00 – 4:30 p.m.

- I. **Welcome and Thank You Remarks:** Holley Schramski and Jared Peden  
Thank you to all of you who keep us going! Thank you to Holley for everything you have done over the years, we could not have done all of this without you and will miss your leadership and guidance. Shawn Hill will be taking over Holley's position as Co-Chair. He feels fortunate to have worked with a number of BSAG members and all BSAG committees on process improvements, and is excited to continue working with everyone.
- II. **Committee Reports:** Committee Co-Chairs and Invited Speakers
- III. **Other Business:**
  - a. **Departmental Request:** Lisa Catanese  
**Process Update:** The Departmental Pass request form has been transitioned from a PDF form to a TeamDynamix ticket! The online form will be maintained by Auxiliary Services and passes will be mailed to departments. Questions can go to the [OneStop Shop](#).
  - b. **Networking for Business Professionals:** Jared Peden  
**Update on Program:** We are going to begin this initiative in August, and it will be communicated through the Weekly Status Call, Tuesday Tips, and both business listservs. There will be a Qualtrics form to complete that will give everyone an opportunity to be sorted by location and topic preferences. This will be launched as a virtual program at first with the option to meet in person in September. This will be led by FAST and GRASP graduates. Committee members and more info can be found on the current projects page of the [BSAG website](#).
  - c. **Reporting:** Laurel Palmer and Shawn Hill  
**New Dashboards:** Building tools to help the community make better data-driven decisions. A new KPI dashboard is live as of July 15 and shows the average time it takes for these expense reports to be approved and action times to name a few. This report also shows how your department compares to the university. Below the main chart, there are also more details on departmental processing times. Please don't hesitate to provide feedback. Additionally, there is also a new report showing revenue, expenditure, and deposit trends based on fiscal years. It also has YTD and MTD reports. Additional KPI and Service Level dashboards are coming soon. Stay tuned!  
**Cube Changes -> Recent Reporting Changes/Updates:** On July 10, the data source change from PROJ\_RESOURCE table to the Commitment Control tables was completed. New budget and project cubes were released and Tableau reports were updated. In addition, the Budget Status Report version 1.0 was decommissioned.  
**Data Warehouse: Scheduled Enhancement Releases (poll):** The Data Warehouse proposed to shift into a more scheduled release format to improve our ability to communicate and provide training aides. This release format would entail grouping enhancements into releases. This

does not apply to situations where something is broken or wrong. Items such as these will be fixed as needed and will not need to wait for a scheduled release. Releases will be communicated well in advance. This does not apply to reporting enhancements for other systems and platforms, only Data Warehouse related enhancements are subject to these scheduled releases. Feedback was overwhelmingly positive with some neutral responses. No negative responses were received. We will plan to move forward with the practice of scheduling releases.

**Upcoming GL Journal Cube release:** New cube announcement. The release is planned for this fall. The cube will contain balance sheet accounts and will serve as an “actuals” reporting tool. This cube will also be used as a historical reporting tool.

- d. **Best Practices Guide:** Holley Schramski and Crystal Rogers  
**Update on Program:** Crystal Rogers will be taking the facilitator/leadership role for the Best Practices group! Once UGA is back to more normal operations this fall semester, this group will continue its work. The group took a hiatus during remote business operations. The Best Practices library is in the Training Library, but it has not been broadly communicated outside of BSAG. We will put a link on the OS homepage, but we currently have it posted in the [March 3 meeting minutes](#) and [here](#). Please have others in your organization review and give any possible feedback. We are especially looking for volunteers who would be willing to “sponsor” a best practices topic so we can have more of these published. There are a wide range of topics listed in the library dealing with financial, human resource, and other administrative processes. We welcome any volunteers so we can build out this best practices library and share across the university.
- e. **FACTS Program Update:** Ben Nunally and Victoria Salyers  
**Update on Program:** The FACTS program will be relaunching in the fall with a pilot group and will now be held in a remote capacity. The schedule will be different than having two whole days of training over Zoom. More information to come!!
- f. **Special Topics:** Other: No discussions.

***\* The next BSAG Meeting will tentatively be held on September 2 from 3:00 p.m. – 4:30 p.m. at a location to be determined.***