1. **Introductions (standard item)**

2. **Training on drawing tool “Snip-It” – Karen Hulsey**
   
   Please see attachments

3. **Report from Controller’s Office – Randy Miller**
   
   - Direct billing/payments to our local lodging providers. This deals with reservations that UWG departments make for candidates, consultants, student recruits or other non-employees. Handouts provided at meeting should be available on the Travel website by week of October 24th.
   
   - See the Travel website for instructions on Study Abroad travel, wires, etc…
   
   - Please see the Travel website for the revised Georgia In-State Lodging Application Instructions. There has been additional information provided on the UWG P Card payment for student lodging.


   Budget Managers may now run a filled position report from ADP. This may assist you in tracking who is actively employed in which position in your departments. Please refer to the attachment.

5. **One USG Update – Karen Hulsey**


   AON Benefits Administration conversion Go-Live 4/1/17 (from BOSS to AON)

   **Cohort 1** (Georgia Gwinnett & Georgia College).
   - Jan-Apr with Go-Live 4/1/16 (pending AON roll-out on-time).

   **Cohort 2** (possibly UWG)
   - Jan – Mock conversion (UWG Data snapshot to use for system testing and determine potential clean-up needed)
   - Feb - Mar – Data clean-up, Build, and Unit Test
   - Apr – System Test
   - May – User Acceptance Training
   - Jun – Parallel testing with Go-Live around 7/1/16 (dependent on bi-weekly pay schedule)

   **Cohort 3** – Apr-Sept with Oct 1 Go-Live
We have not received notification of which cohort UWG will be in. Information should be shared soon and will be shared at top level with Presidents notified first.

Information from GA Summit:

- **Encumbrance** – projection looks at job data instead of last pay check; fringe is based on last paycheck
- **Time & Labor** – work week changing from Sunday to Saturday; Time-off requests must be requested and approved *(for all leave including sick leave and unplanned annual leave)* – monthly employees will no longer fill out time sheet and approve; time & labor and absence management are two separate modules; real time integration (no overnight updates); Java not needed; licenses eliminated
- **SSC** – Shared Services Center, Sandersville, GA; 43 FT employees; 51,000 active employees & 27 Institutions; 1.6 billion gross payroll CY2015
- **OneUSG Project roles at UWG**
  - Project Manager – Rodney Byrd
  - Business/Functional Lead – Rodney Byrd/Juanita Hicks
  - Technical Lead – Hugh Russell
  - Change Management Lead – Dan Lewis
- **‘Reports To’ changes** –
  - A position will report to or be supervised by another position; not a person.
    - This may result in more positions needed if there are different direct supervisors
    - Ex. 50 students hired in one position, 3 different supervisors, would need 3 separate position numbers
  - The supervisor field (employee who has authorization to hire/fire) will be controlled on the position management side of the system (Budget Services)
  - The ‘Reports To’ timecard approver will be controlled on the payroll side of the system
  - The supervisor you have on the position management side can be different from the supervisor that you have on your payroll side. You can have separate supervisors on the payroll side (who approve time only) for the same position, but you can only have one supervisor on the position management side (who hires and fires) per position.
  - If you have multiple employees in a position with different ‘reports to’ hire/fire supervisors, separate positions will have to be created.
  - Karen asked for departments to send her a list of the positions that departments believe have more than one supervisor. This will help our office know how many new positions we can expect.
  - Example: Position 500 in the Theatre department has 30 student assistants hired
    - a) 15 students are supervised by Mr. Smith
    - b) 15 students are supervised by Mrs. Jones
    - c) Neither Mr. Smith or Mrs. Jones has the authority to hire/fire the students
    - d) Mr. Ross is the hire/fire supervisor for all students employed in the department
    - e) Mr. Ross would need to be entered as the ‘Reports To’ on the position management (Budget) side of the system
    - f) Mr. Smith would be entered on the payroll side of the system as the ‘Reports To’ timecard approver for his 15 students
    - g) Mrs. Jones would be entered on the payroll side of the system as the ‘Reports To’ timecard approver for her 15 students
6. ePAR Department Implementations – Karen Hulsey

January 3 will mark the start of the next group of departments using the automated ePAR form. The divisions transitioning are President, SAEM, University Advancement, and ITS as well as Athletics, Townsend Center, and the Coliseum (students only). SAFBA will not be rolled out in January due to an unforeseen complication, so they will now be scheduled to rollout with VPAA. Please note the ePAR system will be down beginning November 23 and will not be available until January 3. Please note that grant-funded and graduate student PARs will not be converted until fall 2017. A more complete deadline may be found in the “Calendar” section of Budget Services website at: http://www.westga.edu/budget/index_16486.php

Overview sessions for Phase 2 participants are scheduled for:
Monday, October 31, 2:00-3:00pm, 3009 Skybox Coliseum
Wednesday, November 2, 8:30-9:30am, 3009 Skybox Coliseum

Training sessions for the Phase 2 are listed below. Registration opens next week on CBE training website. The CBE website should post these trainings by the end of the week.
- Monday, November 14, 2:00-4:00pm, Coliseum Computer Lab 2102
- Tuesday, November 15, 9:00-11:00am, Coliseum Computer Lab 2102
- Friday, November 18, 9:00-11:00am, Coliseum Computer Lab 2102
- Tuesday, November 29, 2:00-4:00pm, Coliseum Computer Lab 2102
- Wednesday, November 30, 2:00-4:00pm, Coliseum Computer Lab 2102

7. FY2017 Budget Development update – Kristin Smith

FY2017 Position Tracking Sheets will go out to colleges/divisions by the end of October. This will include all fund codes. The sheets will be sent out to the college/division budget manager who will then disseminate them out to the departments as they see fit.

8. New Analyst Assignments

Effective November 1, the new assignments will begin.

<table>
<thead>
<tr>
<th>Analyst</th>
<th>Departments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caroline</td>
<td>STEM/SEED, Library, Police, COAH, COSM, Facilities</td>
</tr>
<tr>
<td>Scott</td>
<td>UA, COE, COSS, DL/Extended Learning, Scholarships, ITS</td>
</tr>
<tr>
<td>Daron</td>
<td>Honors, SRAP, SON, SAEM, SAFBA (committee work), RCOB, ORSP, FWSP (committee work)</td>
</tr>
<tr>
<td>Kristin</td>
<td>VPAA (non-Extended Learning)</td>
</tr>
<tr>
<td>Jennifer</td>
<td>All Auxiliary departments including E&amp;G, AO Admin, Track &amp; Tennis, Townsend</td>
</tr>
<tr>
<td>Michelle</td>
<td>Capital Projects (dept id 6xxxxxx), Revenues for 1067103, 1067105, 1067106, 1041114; external reporting; revenue analysis/forecasting; Offsets; Reserves (1039105, 1045909)</td>
</tr>
</tbody>
</table>
Roundtable

- Harry asked about the use of “Temporary” part time faculty positions for the spring. At this moment the plan is to not use those positions in the spring and the Budget Office will work to inactivate those as soon as all employees have been removed from the positions in January.

- The question was asked about the timeline for the departments to receive their FY17 Fund 14000 fund balance numbers. Michelle was going to speak with Randall Rowland to see if he has an idea of when to expect those. We also brought up our 50% budget rule which allows those departments with need of additional budget to use up to 50% of their projected fund balance until we receive the final numbers from Accounting. The projected fund balance can be calculated by taking the FY16 fund balance from Accounting, plus additional revenues collected, less all expenses and encumbrances in FY16.

- Mike Speir announced the temporary changes in Facilities. Until the Director of Facilities position is filled, Fred Ricketson will be filling in as Interim Director of Facilities until the end of December. Sheree Srader will be filling in as Interim Director of Campus Planning until the end of December. They plan on having a permanent replacement for Bob Watkins no later than January 2017.

- Michelle mentioned that by the end of next week she will be sending the memos for Miscellaneous/Elective/Course fees out to the areas. The Mandatory Fee memos will be sent out next week and are due to the Board of Regents by 12/16/16. The template and instructions for the 5-Year Business Plans have already been sent out. The memos for Miscellaneous/Elective/Course fees are due back to Budget before the winter break in December. Michelle asked that departments look closely at the list of Course fees that she is sending out to make sure they all still apply.
Using the Microsoft Snipping Tool

The snipping tool is used for cutting (snipping) a section of data from a page to share on a different document, email, or save as a file. It does not work if you need to click to open up the data or screen view after you’ve activated the snipping tool. When used in emails, the freehand lines stay it works better than the Insert/Screenshot tool in emails. It does not shrink the data so tiny it is unreadable by the receiver. You can also use the snip it tool to highlight or add a freehand circle to the data you snipped.

Where do I find the Snipping Tool?

1. Left click on the microsoft icon in the bottom left of your home screen.

2. Enter ‘Snipping Tool’ in search box under the words “All Programs.”

3. The program should pop up as you type
4. Can drag icon down to taskbar for future use

**How do I snip?**

1. Have the file open on your screen. Be sure you are at the location of the data in the file.
2. Click on the snip it icon.
3. Highlight the data you want to transfer or “snip” to another document. In the example below these two paragraphs were highlighted from one document. Using the tool bar options across the top of the screen the pen was used to highlight the rates in yellow.

4. You may also use the pen to free hand circles, figures, or write words. Using the eraser you may delete any markings you make.

5. Save the changes you made or you may Email from the snipped data screen
6. Copy the data to paste into another document

7. Save the snipped data as a separate file

8. Before starting a new snipping, close the previous snipping window
ADP Reporting – Filled Positions Report and All Positions Report

Both of these reports are very useful in position management and contain a few different data elements. The Office of Budget Services uses the combination of both these reports to prepare the Filled and Vacant Position Report that is updated on the website monthly using the common data element “position number.”

As these reports include salary data, you will only receive data for departments to which you’ve been given access. If that is not the case, please contact Budget Services immediately.

1. Login to ADP Reporting

2. From Home screen go to ‘Edit’ and ‘Edit Custom Reports’

3. Enter ‘540’ in ‘Report Name/Title’ field and click ‘FILTER’
4. Search for the names of the two reports in the screenshot below

<table>
<thead>
<tr>
<th>NAME / TITLE</th>
<th>TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>540 All Positions Report - Budget Managers 10.20.16</td>
<td>Public</td>
</tr>
<tr>
<td>540 Filled Positions Report - Budget Managers 10.20.16</td>
<td>Public</td>
</tr>
</tbody>
</table>

5. Copy the report by clicking on the Copy button to the right of the report name & choose ‘Copy.’


Neither report requires any edits to the filters; simply open the report and ‘Run.’ The data is pulling as of the date the report is being run. Some of the unique fields on each report are highlighted for you.

The filled position report will provide more “people” data with the following data results:
- Home Department ID
- Position Number
- Position Description
- Employee Name
- ADP Employee ID
- Compensation Rate (Hourly, Monthly, or Annually depending on the type of employee)
- Annual Rate
- Annual Benefits Base Rate (This should be the same amount as the annual rate. This is the value that benefit deductions are based on.)
- Payroll Distribution Code
- Percentage of Distribution
- Pay Group
The ‘All Position Report’ will provide more budget position data with the following data results:

- Position Number
- Position Description
- Home Department ID
- Home Department Name
- Funding Department ID
- Pay Group
- Job Code
- Percentage of Distribution
- Payroll Distribution Code
- Account Code
- Fund
- Program
- Class
- Project
- Position Budget
- Standard Hours

Note: The snip-it tool was used to place the screenshots on this attachment and insert the highlights and circles.