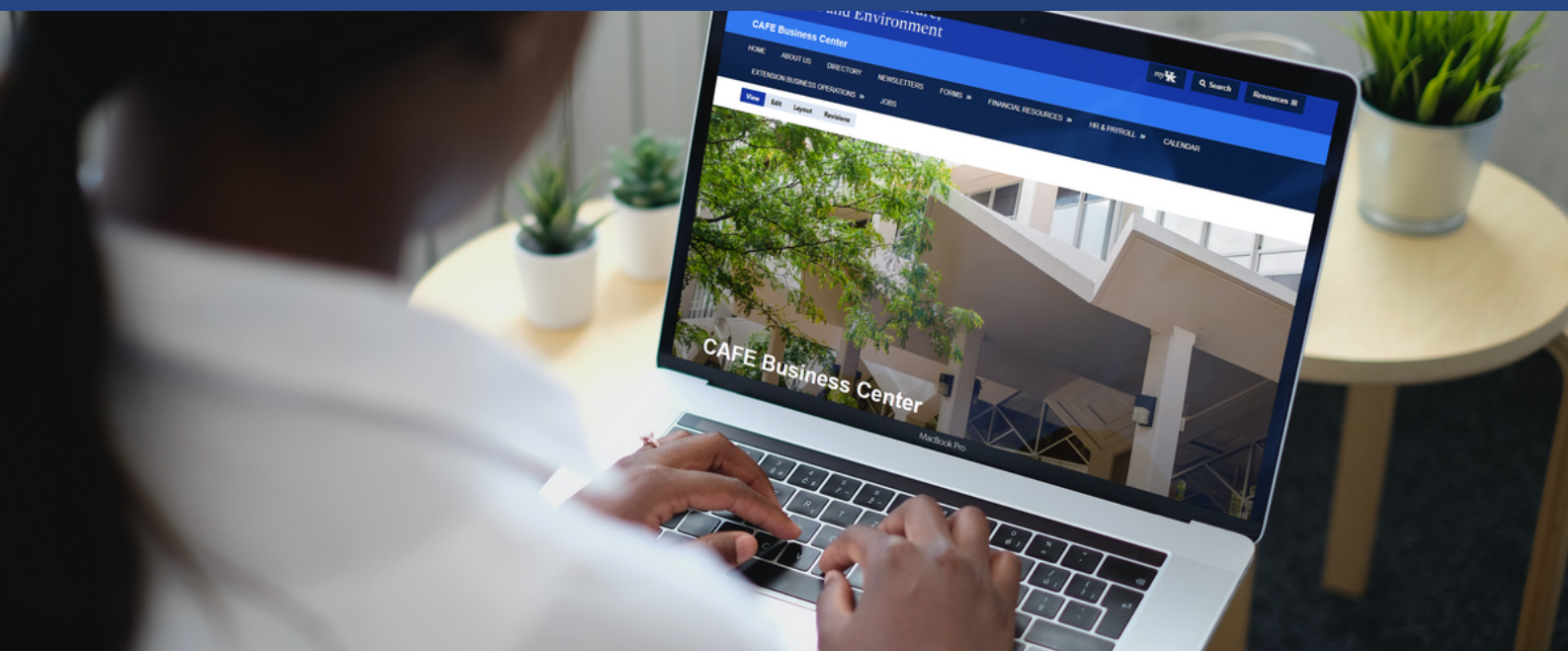


# CAFE Business Center Newsletter



Name - Tymory Stanton  
Department - Entomology  
Role - Business Officer

## Staff Spotlight



"Being asked to assist in managing expenses and funds for a portion of an externally sponsored grant made me really nervous.

Tymory Stanton from Entomology was suggested as a point of contact as she manages several grants for her department. She was willing and able to walk me through basic policies, required documentation, and passed along several other tips and tricks to ease my nerves. Tymory has been willing to meet with me in-person and through Teams, despite her busy schedule. Having her as a resource has been amazing."

- Courtney Bartlett, Program & Staff Development

## New EBO Director

We would like to welcome Becky Amsler to the CAFE Business Center team. Becky started in October as the new Extension Business Operations Director. Becky most recently comes from Centre College where she served as the Controller. However, Becky is no stranger to UK. She previously worked in the College of Fine Arts Business Office.

We are excited to have Becky as a member of our team!



## Business Center Staff

- Susan Campbell 7-5934
- Le Anne Herzog 7-2981
- Chris Johnson 8-3906
- Melissa Howard 7-4722
- Maggie Maynard 7-7143
- Jason Hardin 562-2994
- Cristin Costello 8-6680
- Angela Knapp 7-9833
- Shelby Verhoeven TBD

### Extension Business Operations

- Rebecca Amsler 7-7194
- Tina Ward 7-0132
- Zach Waller 7-4254
- Lindsay Poore 323-4499
- Ryan Martin 7-7241
- Natalie Simpson 7-1553

## Inside this Issue

- General Updates 2
- HR Updates 3-7
- Grant Reminders 8-9
- FI Updates 10-14

# GENERAL UPDATES

January 2023

## **Patty Brophy Memorial Scholarship**

Our colleagues in UFS established the Patty Brophy Study Abroad Travel Scholarship Endowment Fund with UK Philanthropy to honor Patty's nearly twenty years of service to the University. If anyone is interested in making a tax-deductible contribution to that fund, the link can be found [here](#).

## **MEGAN LUCY TRANSFERRED OUT OF CAFE**

Effective October 24th, Megan Lucy, previously the Assistant Director of Faculty Resources, has transferred out of CAFE to a new position in the Provost's office. We are sad to lose Megan, but wish her the best in her new position! Any items that would have previously been sent to Megan should now be routed to [cafe-frpa@uky.edu](mailto:cafe-frpa@uky.edu).

## **Zoom Sign-In Tip**

When signing into Zoom, use the Sign in with SSO option. When prompted for the domain, enter "UKY" and click continue. Then sign in with your LinkBlue credentials. This will connect you to UK's licensed account and will automatically display your full name upon connecting to the Zoom.

## **ONLINE W-2 ACCESS**

University of Kentucky employees have the option to access their W-2 statements online through Employee Self Service (ESS) of myUK using their linkblue username and password.

Instructions to select online delivery can be found on the UK Human Resources [W-2 Online Delivery](#) webpage.

For additional details, please review the recent UKNow article at this [link](#).



## STAFF PERFORMANCE EVALUATIONS TOOLKIT

You can take an active role in the performance evaluation process. As you may know, the [CAFE Employee Resources](#) page has many helpful performance resources. Resources include a video tutorial on [How to Participate in Your Self Evaluation](#), a [Self-Evaluation Toolkit](#), and an explanation of the timeline. If you would like to explore some professional development opportunities check out the Employee Enhancement Programs & Professional Development sections of the page. Additionally, there is help for supervisors on the [CAFE Supervisor Resources page](#).

Flyer – [2022 – Staff PE Timeline & Resources](#)

## STAFF PERFORMANCE EVALUATIONS RESOURCES



**Lunch & Learn**  
**1/6/23**  
**12-1pm**

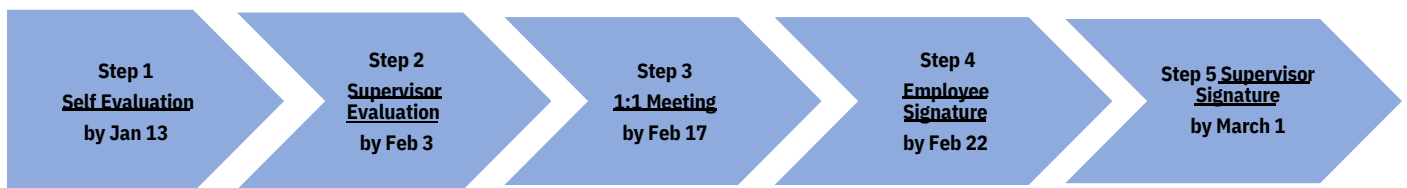
Supervisors are invited to join us at the **Successfully Managing the Performance Evaluation Process** session. Click [here](#) to register.

## 2022 Staff Performance Evaluations

Recommended Timeline &  
Resources



### Recommended Timeline



### Resources

- Find resources for employees @ <https://cafebusinesscenter.ca.uky.edu/content/EmployeeResources>
- Find resources for supervisors @ <https://cafebusinesscenter.ca.uky.edu/content/SupervisorResources>

### Video Tutorials



Employees may find this video tutorial on How to Participate in Your Self Evaluation helpful

<https://cafebusinesscenter.ca.uky.edu/resources/hr-payroll/employee-resources/video-tutorials>

### Lunch & Learn



Supervisors join us for a Lunch & Learn on **Successfully Manage the Performance Evaluation Process**

January 6, RSVP [https://uky.az1.qualtrics.com/jfe/form/SV\\_6Qfbxypt7yTEKua](https://uky.az1.qualtrics.com/jfe/form/SV_6Qfbxypt7yTEKua)

**Pro Tip – Chrome provides the best browser experience**

2022





# HR NEWS

January 2023

## NEW IES FEATURE

Candidates can now sign up for Job Alerts on the UK applicant page and the CAFE Jobs Page.

Things to know about the new Job Alerts features:

- The feature is available for all position types.
- For regular staff positions, the Employment Office will set this up.
- The Search Coordinator will need to select the Job Alert category for student/other job requisition in IES.
- For older student/other job requisitions, search coordinators should add the Job Alert category by

Accessing the Settings tab

Summary | History | **Settings** | Applicants | Reports

And selecting the appropriate Job Alert category

Job Alert

Job Alert Categories

## NEW EMPLOYEE ONBOARDING REMINDER – HYBRID/REMOTE REQUEST FORM

We want to ensure that an employee's onboarding experience is positive.

Once a new employee begins work, if they are requesting a hybrid/remote work arrangement – please remember to share the [Hybrid/Remote Work Request Form](#) – [CAFE](#)

University of Kentucky  
Hybrid/Remote Work Request Form

Date of Request:

Employee Name:  Employee Title:

Employee Department:  Employee Supervisor:

Type of Request:

Please List the City, County, and State Where Remote/Partial Work Will Be Performed

Proposed Schedule

Communication Methods During Hybrid/Remote Work (cell phone, Teams or messaging, Zoom, etc.)

Specific Request (location, software, etc.)

Supervisor Comments

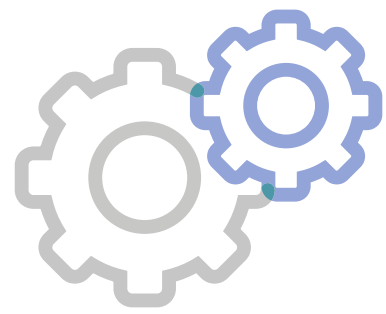
Approval of HR Business Center will coordinate final approval after the form is submitted.

Employee:

Supervisor:

Department Chair/AAE Director:

Dean:



## GSAS/LCT Form – Spring Semester

As a reminder, new GSAS forms are required each semester, deadline for Spring is 1/9/2023 and Royster Memo [Local City Tax](#) Forms are required each semester.

**Pro Tip** – Conduct a quick active employee review, and make sure all graduating grad students/student workers have been separated/assignments ended.

COMING  
SOON

– Keep an eye out for the next HR Huddle session registration



### *Dates to Know*

#### Payroll Earliest Retro Date will set to the following:

Bi-Weekly 12/18/23                      Effective 2/14/23

Monthly 1/1/23                              Effective 2/21/23

Access payroll schedule tutorial [here](#).

#### ECRT Deadlines for FY23, Quarter 2

Pre-Review:     1/17 -2/6/23

Confirmation:   2/7/23-3/7/23

Access ECRT resources [here](#).

#### Staff Performance Evaluation Deadline

3/1/23



**Training Opportunity:** If you need to brush up on your CDEM skills, an open lab will be held on 1/5/23. Register at myUK Learning.



# HR NEWS

January 2023

## STAFF DEGREE COMPLETION FORM

As a reminder, the [Staff Degree Completion Form](#) is available to help maintain the accuracy of the staff degree information in SAP. Please share the form, as needed, with employees in your department who have recently completed a degree.



## STAFF PROFESSIONAL DEVELOPMENT FUND

The Staff Professional Development Fund is now accepting applications. To find out more please click [here](#). The application process is quick and easy. You can access the application [here](#).

## SERVICE AWARDS



**Service Awards** – This year, the college is recognizing 272 staff and faculty who have reached a service milestone. Recipients are given the opportunity to select from a variety of awards, including options for pins, charms, and products from the RCARS Wood Utilization Center. Those awards will be distributed along with individual certificates and letters from Dean Cox recognizing their hard work and dedication to the College of Agriculture, Food and Environment.

# GRANT REMINDERS

January 2023

If you work with sponsored project grant accounts, it is recommended that you take the trainings on the [OSPA TRAINING RESOURCES](#) webpage. We highly recommended the [SRAI LEVEL UP](#). To register for LevelUP, please fill out [this form](#) or contact Gwyn Baty, OSPA Administrative Associate, directly at [gwyn.baty@uky.edu](mailto:gwyn.baty@uky.edu).

Helpful Hits: When running the GMAVCOVRW – Overview of GM AVC Values in SAP please chose variant “JAMILE1”.

- 1) Click on variant at the top of the screen.
- 2) Delete user ID from the box the click execute
- 3)

UK DIRECT RGS	Direct Expense Rgs			REQUIRE	02/17/2019		
/UKDEFAULT	UK Default Variant	A	X	JAMILE1	11/19/2005	JAMILE1	11/08/

**Availability Control Overview for Grant Objects**

GM AVC Overview Report for Ledger 9K

Company Code UK00  
 Grant 0000000000  
 Fund Multiple V  
 Sponsored Program All Values  
 Sponsored Class Multiple Values  
 Time Interval Overall Time Period

Grant/Fund/Sp. Prog./Sp. Class	Consumable Bdg.	Consumed Amt.	Availble Amt.	Deficit Ind.
0000000000	1,483,326.00	1,210,222.39	273,103.61	
0226000060	1,483,326.00	1,210,222.39	273,103.61	
Overall Programs	1,483,326.00	1,210,222.39	273,103.61	
E510000	884,402.00	758,947.82	125,454.18	
E512010	222,558.00	198,189.65	24,368.35	
E540348	0.00	0.00	0.00	
E590020	376,366.00	253,084.92	123,281.08	

**AVC Overview for Grants Management Dimensions**

Company Code UK00  
 Control Ledger

Selection of Control Objects

Grant  
 Fund  
 Sponsored Program  
 Sponsored Class

Selection of Reporting Time-Frame

Overall Values  
 Based on Sponsor's Fiscal Year  
 Based on Grantee's Fiscal Year

Control Parameters

Display Budget Deficits Only

Variant  
 Environment  
 Created By  
 Changed By  
 Original Language

DELETE USER ID

When using Tableau for grant reports and you have a grant that is closed and have corrections, JVs, etc. processed after the end date of the grant. You will need to update the “Lifecycle Status” and “Valid for Fiscal Period” fields in order to see any changes that were processed after the end date of the grant. See screen shot below regarding what to do in tableau when the account is closed.

**Variables**

Grant Number **Required** (None) Sponsored Class (Group)

FISCAL\_YEAR 2023

Fiscal Period (None)

Lifecycle Status (Defaulted to <=15617 Closing) Fund (All)

Valid for Fiscal Period? (If Closed include first option)  
 GM Project & Budget Dates NOT in report period(s)  
 GM Project & Budget Dates IN report period(s)

Company Code UK00

G/L Account (All) Is Closely Related Project (All)

The Lifecycle Status is Defaulted to:  
 15614, Proposal  
 15616, Award  
 15617, Closing

If the Grant is in “Closed” status select the first option



# GRANT REMINDERS

January 2023



## What is an E-Account or Pre-Award Account?

Prior to receiving an award, the Principal Investigator (PI) and Department Chair or Center Director may request an account be established so project work may commence. This type of account is referred to as an E-Account or Pre-Award Account.

To request an E-Account, the PI completes and routes a [PRIOR APPROVAL REQUEST FOR REVISION/ACTION ON SPONSORED PROJECT ACCOUNT](#) and include a statement of responsibility for the costs incurred in the event the award is not funded.

Please view this link for full details: [E-Accounts or Pre-Award Accounts](#)

## [E-50-3: Cost Transfer Policy](#)

Expected award costs Under certain circumstances, it may be necessary for costs to be incurred before an award document has been received for a sponsored project. However, expenditures made pending the receipt of an award or contract may not be charged to another sponsored account in the interim. When necessary for research to begin prior to receipt of award, an expected award account should be requested and established through the Office of Sponsored Projects Administration (OSPA).

## Cost Sharing/Grant Matching - [E-50-2: Cost Sharing](#)

Funding agencies may require cost sharing or matching in several different ways. This may involve shared faculty time or direct funding of portions of the work. Careful consideration of how to meet such requirements, to strengthen proposals, yet support the University of Kentucky in securing the full cost of research, is critical. Agencies and programs differ greatly in these procedures.

The Office of Sponsored Projects Administration, [College Grants Officers or Research Administrators](#) are the best contacts for questions concerning meeting cost sharing requirements. They welcome discussion on such matters well in advance of proposal submission. If the cost share does not involve waiver of indirect cost or funds from the VP for Research, no additional information aside from the Internal Approval Form and accompanying documentation is necessary.

College Grant Officers: Agriculture - [Kim Hall](#), [Kimberly Monast](#)

When charging cost share you **MUST CHANGE** the **FUND NUMBER** to **0011890300 PROVOST COST SHARE** otherwise the cost will charge directly to the grant. The College of Ag departments are on automatic funded cost share this means that each month RFS (Research Financial Services) JV ALL the cost share to a departmental account. It is up to the department to move the charges by JV to the appropriate Cost Center (this may be to an outside College or Department).

Additional information on Cost Sharing Accounts is available through University Financial Service's [Accounts Receivable and Compliance page](#).



## UNIVERSITY AWARD ESTABLISHMENT PROCESS

There is an official process for establishing university awards given to students, faculty and staff. Any student or employee awards over \$50 must be part of a program approved by the President.

Departments intending on establishing an award should contact [Cristin Costello](#) to begin the process. The process should be started well in advance of determining award recipients, as it can take months for awards to be fully approved. Please see [BPM E-7-12](#) (employee awards) or [BPM E-7-11](#) (student awards) for more information.

## Equipment Inventory



- The university capital equipment inventory process opened on November 1st. All capital equipment should have been scanned/verified in the eBars system by December 15th, with exceptions (such as lost or stolen items) processed by January 31st. Resources can be found on the [Capital Assets Accounting website](#) or on our [CAFE Business Center resources page](#). For questions contact [Steve Strunk](#) or [Capital Assets Accounting](#).

## TABLEAU UPDATES

### Budget vs Actuals Instructions



- Funds center budget vs actuals reports can be found on Tableau at the path below -

Explore / Financial Reporting / FI Financial Accounting / Funds Management / Budget Control / Budget vs Actual

- Once here, the "Budget vs Actual - 1" report is usually best for cost center reporting
- Then, click "variable screen" to customize the report for your specific department, financial period, and/or cost center
- Click "execute" to run your report. View in Tableau or export to excel to filter as needed.

Fiscal Period: 006 - December | Fiscal Year: 2023 | Document Number: [ ]

Company Code: UK00 | Order (SIO): [ ]

Business Area (Combined): (All) | Funding Category: (All)

Functional Area (Combined): (All)

FCTR Budget Family (Combined): (All)

Fund (Combined): (All)

Department (Combined): 81030, CAFE BUSINESS CENTER

Funds Center (Combined): 1012151350, BUS CTR NON-SPONSORED INSTRUCTION

Commitment Item (Combined): (All)

Document Type (Combined): (All)

Expense\_Line: [ ]

Revenue\_Line: [ ]

**EXECUTE**

Funds Center	Funds Center Name	Funding Category	Commitment Item	TEXT	Expense_Line
1012151350	BUS CTR NON-SPONSORED INSTRUCTION	5	512021	Null	
				50131052	
				51019263	
				51041575	
				51049851	
				Monthly (05/01/2022-05/31/2022)	
				Monthly (06/01/2022-06/30/2022)	
				Monthly (07/01/2022-07/31/2022)	
				Monthly (08/01/2022-08/31/2022)	
				Monthly (09/01/2022-09/30/2022)	
				Monthly (10/01/2022-10/31/2022)	
				Monthly (11/01/2022-11/30/2022)	
				Total	

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Data  
Crosstab  
PDF  
PowerPoint  
Tableau Workbook

Download Crosstab

Select a sheet from this dashboard

Select Format

Excel  
CSV

Download

Find our more financial resources on the [CAFE Business Center website](#). Please contact the [CAFE Business Analysts](#) group via email with any finance-related questions.





## TABLEAU UPDATES

### Budget vs Actuals Quick Links

Links to budget vs actuals reports and their appropriate use can be found on Tableau at the following path -

Explore / Financial Reporting / FI Financial Accounting / Funds Management / Budget Control / Budget vs Actual / Budget vs Actual Reports Quick Links

#### Budget vs Actual Quick Links

The Budget vs Actual reports track the expenses against the budget amount. There are four versions of this report. Each report displays the data differently. The user has the option to select the version that works best when analyzing the data.

Every version of the Budget vs Actual report provides an aggregate view by department. To view additional details the user can either click on data points on the Budget vs Actual view or select the detail tabs located on the top left of the workbook. Please see additional information about each version of the report listed below.

Link to the most used Budget vs Actual report: <https://analytics.uky.edu/#/projects/1424>

Link to the additional versions of the Budget vs Actual Reports: <https://analytics.uky.edu/#/projects/1423>

New Report Budget vs Actual - 1 <https://analytics.uky.edu/#/workbooks/14092/views>

Old Report: (This workbook provides the details on separate sheets) Funds center balances Budgets vs Actuals

This version of Budget vs Actual provides a variable screen for the end-users to make selections, the Budget vs Actual details provides expenses against the budget amount, and eight additional views that provides vendor, entry document, and actual details data. The user must select Funds Center details or Values on the Budget vs Actual report, to view details on the other views within the workbook.

New Report: Budget vs Actual -2 <https://analytics.uky.edu/#/workbooks/14093/views>

Old Report: Budget vs Actual (Start Page with Filters)

This version of Budget vs Actual provides a START PAGE for the end-users to make selections before selecting Execute. The Budget vs Actual details provides expenses against the budget amount by department, funds center and category. The user can view the Actual Detail by Period and Actual Detail with Vendor by selecting the tabs under 'Refresh' and 'Pause' located on the left side.

New Report: Budget vs Actual - 3 <https://analytics.uky.edu/#/workbooks/14094/views>

Old Report: Budget vs Actuals \_New Version

This version provides the VARIABLE Screen for the user to make their selections. The DEPARTMENT is required to view details on these reports. Once the user make selections, including the department, select execute or go directly to the Budget vs Actual tab located on the top left. On the Budget vs Actual view if the user selects any of the data fields on the report, a pop-up will appear to view FUND CENTER DETAILS. There are seven additional data details related to the budget and actual such as encumbrance, budget entry details, actuals, and vendor details.

New Report: Budget vs Actual - 4 <https://analytics.uky.edu/#/workbooks/14096/views>

Old Report: Funds center balances \_ Budgets vs Actuals

This Budget vs Actual 4 version has five data views, plus the about the workbook view. The VARIABLE screen provides several fields for the user to make their selections before selecting EXECUTE. The EXECUTE button takes the user to Budget vs Actual view. The user must select data on the Budget vs Actual view to see the data displayed on the other views within the workbook.

Click on "Provide Feedback" below to send an email to [Analytics@uky.edu](mailto:Analytics@uky.edu)

Provide Feedback

Find our more financial resources on the [CAFE Business Center website](#). Please contact the [CAFE Business Analysts](#) group via email with any finance-related questions.



### TABLEAU UPDATES

## Concur Reporting

- Pro-card transactions and travel should be submitted to Accounts Payable by the 15th of the month following the transaction date/dates of travel. Reports should be fully processed no more than 60 days following the transaction date or last day of travel.
- Pro-cards with open transactions over 60 days old are at risk for suspension. Employees with open travel reimbursements over 60 days old will be reimbursed through payroll, and will be taxed on the reimbursement.
- Departments should run reports monthly to ensure pro-card and travel reports are going through workflow in a timely manner.
- There are two reports available in Tableau to view the status of your department's concur data -

View pro-card transactions not assigned to an expense report

← Explore / Business Officer Reports / Concur Reports / Concur Travel and Expense Management Reports / Procard Unassigned Transactions

Filters	
Transaction Date	5/28/2021 12/2/2022
Department Code	(All)
Department	(All)
Employee	(All)
Employee Id	(All)
Transaction Status	UN

View open expense reports (pro-card and travel)

← Explore / Business Officer Reports / Concur Reports / Concur Travel and Expense Management Reports / Concur Expense Reports

It is important to ensure you are using appropriate filters when running reports. Be sure that all dates are selected, you have filtered to your specific department, and are including all data statuses so your report captures all information. Tableau is typically one day behind data in SAP/Concur, so remember that live actions in Concur will likely not be reflected in your report.

Find our more financial resources on the [CAFE Business Center website](#). Please contact the [CAFE Business Analysts](#) group via email with any finance-related questions.



## MANAGING DIGITAL SIGNATURES

### Using a Digital Signature to Sign a Document

- The first signer will need to download the form from their web browser or email and open with Adobe.
- There are two options to complete the signature.
  - 1st Option - The signer can select the "certificates" tool (select "more tools" to add "certificates" if it is not available in your tool ribbon).
  - 2nd Option - The signer can simply click on the pre-created digital signature box, if available.
    - If you do not have a saved adobe signature, you will need to create one.
  - Then, save a new copy of the document with the digital signature added and send to the appropriate person.
  - If further signatures are needed, be sure you have not selected the "lock document after signing" option

**Find our full Quick Reference Guide on digital signatures [here](#)**

## QRG – View Concur Docs in SAP

- 1.Run KSBI on the cost center/period you want to view
- 2.Filter view to "XC" documents
- 3.Locate the "RefDocNo" on the concur expense in question (may need to alter your layout to view)
- 4.Open new SAP window and enter t-code "FB03"
- 5.Click "document list" icon
- 6.Input appropriate fiscal year and "RefDocNo" from KSBI (excluding "1"), then click execute icon
- 7.Double click on document to view details
- 8.Click the dropdown list on the "services for object" icon to view the attachment list
- 9.Click on the specific expense to view concur documents

**View our full Quick Reference Guide [here](#)**

\*  
\*  
Happy  
holidays  
\*

from the CAFE  
Business Center  
Team!

