Agenda Items

Guest Speakers

Matt Dillon – IT Security* – *ITS and Internal Audit are stepping up to make the UK computing environment more secure. Everyone is urged to use caution when dealing with PII (Personally Identifiable Information), use secure passwords, and check to see if their computer is logging into the AD domain. Two Factor Authentication is in the initial phases of being rolled out. It uses an extra step to check your login credentials. As an added bonus, if you are using Two Factor Authentication and meet the updated UK password policy requirements, your password will be eligible for a 365-day grace period before you are required to change it again. To be added to the list, contact Matt Dillon at matt.dillon@uky.edu with the subject line "Two Factor Authentication". A handout, which includes the major points of the presentation, is attached.*

Megan Lucy – *Dr .Lisa Collins has retired but is working in a post-retirement assignment in the Associate Dean's Office. Dr. Sandra Bastin has accepted the position which Dr. Collins held. That office is now the Associate Dean's Office for Faculty Resources, Planning & Assessment and remains in the same location, L104 Ag North.*

1. **Research & Grants**
    a. Federal Fiscal Year End Closing* – *The FFY18 closing schedule is attached. Cost distributions for salaries on federal funds should be ended on 9/30/18, and new screen entries should be done beginning 10/1/18 on new year (025*19) funds. Departments should follow up on JV's on FFY18 funds.*
    b. CAS and Encumbrance Reviews on FFY18 Funds – *Remember to review all open items such as PO's, PRD's and parked JV's to assure that all items on the FFY18 fund have posted appropriately prior to September 30. Units should work with their business analysts and the central offices to clear up any outstanding items.*
    c. Sponsored vs. Non-Sponsored* – *The purpose of an expense will determine which state cost center units will use for specific expenditures. With the exception of the college administrative units, most departments will continue to use the accounts as they have been, i.e. charging research-related expenses to the sponsored cost centers they've used in the past. There is more information on this on our web site at: http://cafebusinesscenter.ca.uky.edu/files/cafe_cost_centers_sponsored_vs_non-sponsored.pdf*
    d. FCG Parent Grant Expenses* – *Monthly reports are distributed to the units by the Business Center. Parent grants should only contain budget; project expenses are to be charged to the individual project grants. Departments are urged to clean up any amounts that are reflected on this report as soon as they receive these reports throughout the year and should not wait until the end of the year to allocate expenses to the appropriate projects. This will help with the annual Reeport Financials (formerly known as AD419) reporting each year in January. If any questions, contact your business analyst.*
    e. Reminders – Uniform Guidance for Grant Funds* – *Effective 7/1/18, any purchase on grant funds that is over 5K requires three quotes. Purchasing will get those for you, but it will delay your purchase; so departments are urged to obtain their own quotes. If the purchase is from a UK-contracted vendor, there is no need to solicit quotes from other vendors. Also, if the purchase is made on state funds but there is a chance it will be transferred to a sponsored project or grant at a later date, the three quotes are required.*

2. **Procurement & Travel**
    a. New Vendor System – PaymentWorks* - *The new online vendor system went live on 8/10/18. Any new vendor will need to be added via PaymentWorks from this date forward. The system is found within the Enterprise Services on the myUK portal. Departments will initiate the invite to the new vendor, and the vendor follows the steps on their screen in order to be added to the UK vendor database. Continue to perform searches as you do currently to determine if a vendor is already in the University's database. This may include checking directly within your Shopping Cart / Requisition or PRD using vendor search tools. You can also use SAP t-code XK03 for direct searches (help guide: http://www.uky.edu/Purchasing/docs/vendorsearch.docx). At a later date, the University's entire existing database will be integrated within PaymentWorks allowing full vendor searches from within the application.*

NEXT MEETING: Tuesday – November 13, 2018, 9:00 am (Gorham Hall, Good Barn)

The handout, which outlines the procedure, is attached. If any questions, please contact April Lyons or your business analyst. Frequently asked questions can be found at the following link: http://www.uky.edu/Purchasing/docs/paymentworksfaq.pdf.

3. **HR & Payroll**

   a. eCRT Update* - *CAFE has a very high success rate in getting the eCRT pre-reviews and confirmations completed on time. Research Financial Services (RFS) has loaded an FY19 Project Payroll Confirmation Calendar to their website. A copy of the calendar is attached and can be found at: http://www.uky.edu/ufs/sites/www.uky.edu.ufs/files/FY19%20Calendar%20for%20Website_0.pdf.*

   It is very important for the Primary Department Effort Coordinator to train their back-up coordinator how to do this, in case of an emergency. Please review the attached "eCRT Updates" and if you have questions, you may email ecrt.help@uky.edu for the quickest response.

   b. Payroll Vacation Coverage – *Departments should give the Business Center (Chris Fensin) advance notice if their HR staff person will be on vacation on a payroll Monday and indicate what type of assistance they need. If an unexpected TDL occurs on a payroll Monday, please send a quick email to Chris at cajo224@uky.edu or call Chris at 218-3906, so that she can assist your department. Multiple HR staff being out of the office on those critical payroll days without advance notice creates workload issues in the Business Center for those who have to cover these absences. On those payroll Mondays, emails about other matters will be addressed on the following work day.*

   c. Staff Professional Development Fund* – *In keeping with the college's strategic plan, this fund was initiated by the Dean this past spring to support staff who need funds to fulfil their professional development goals in the college. The Dean is offering this funding once again this fall and hopes that staff will take advantage of this opportunity. The deadline for applying for these funds for this fall is September 14, 2018. One of the MJR's of all staff personnel in the college is professional development. There is a list of opportunities on our web site at: http://cafebusinesscenter.ca.uky.edu/files/staff_professional_development_opportunities.pdf. Some include fees, but there are many classes and training sessions (most of which are free) to choose from. The application for applying for funds can be found at: http://cafebusinesscenter.ca.uky.edu/files/staff_professional_development_fund_request_-_cafe_-_080718_1.pdf. Questions can be directed to agbusinesscenter@uky.edu. A flyer is attached.*

   d. myUK Learning* - *This replaces the Training link on the Employee Self Service tab. It is a new learning management system for UK employees. A handout is included that provides an overview of this system (which is very similar to the Performance Evaluation format) as well as navigational guidelines for using myUK Learning.*

4. **Budget & Finance**

   a. Training Plan QRG* - *The BW/SAP training plan guidelines have been revised (handout attached) and will soon be on our web site. Also attached are some helpful tips for entering training plans for your department's employees. If any questions, contact Kim in the Business Center.*

   b. Budget Update for FY19 – *Unit budgets have already been distributed to the departments for review. If questions, please contact your business analyst. While UK took a budget cut from the state for this fiscal year, some of it was offset by performance dollars we received. However, some departments were required to fund their own merit increases.*

   c. Commitments – *April will begin funding the Dean's commitments after the analysts finalize unit budget meetings with all of the units. Dean's commitment reviews have been sent to each applicable chair and business officer. It is asked that each department confirm that the data is correct or provide corrections as needed. Funding of the commitments will be prioritized in the order in which the commitment confirmations have been received.*

5. **Professional Development**

   a. Training & Development* – Michelle Jones – *A copy of this Professional Development handout and the individual handouts are all attached. All of those who attended this session will receive credit toward their Professional Development MJR.*

6. **Other**

   a. New Staff Introductions
      i. **Abbie Cain**, *Plant & Soil Sciences*
      ii. **Lauren McMahan**, *Plant & Soil Sciences*

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        iii.   **Melissa Horton**, *Business Center (HR Specialist)*

        iv.   **Jeremy Teal**, *Business Center (Extension Compliance Officer) begins 8/15/18*

b. Meeting Topic Requests – *Send any meeting topic requests to Kim King or Le Anne Herzog.*

c. Sign-In Sheet

d. Relay meeting info to other departmental staff

*Includes handout

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http://cafebusinesscenter.ca.uky.edu

IT Security

Computers/laptops

- ▶ Active Directory!
  - ▶ Computers that are able to put on the domain should be
  - ▶ This will help ensure that computers are secure, up to date, scanned, and further protected
    - ▶ SCCM (Controls Updates)
    - ▶ Threatstrike (Helps Prevent Account Hacking)
    - ▶ Vulnerability scans (Testing and Prevention)
    - ▶ Password enforcement (Computer Security)
- ▶ You're going to ask, "How do I know if my computer is on the AD?"
  - ▶ Are you logging into your computer with your AD username and password?
  - ▶ If in doubt contact your "friendly neighborhood IT tech"

Passwords

- Strong Passwords are a MUST!
- Two Factor Authentication
- Once you are on the "list" you will be able to turn it on via ukam.uky.edu
- For more information visit...
  www.uky.edu/ittakes2
- Password Policy Change
  - If you meet these requirements...
  - Your next password change will be 365 days
- If you are interested in signing up contact me at matt.dillon@uky.edu

Password Requirements

- ❗ Minimum 10 Characters
- ❗ At least one uppercase letter
- ❗ At least one lowercase letter
- ❗ At least one space
- ☑ No character three times in a row
- ❗ Password not previously hacked
- ❗ Not a known bad password
- ❗ Doesn't Contain personal details

PII

- What is PII?

- Personally Identifiable Information

- If it MUST be kept...
  - Store on UK Office 365 One Drive
    - UK has a BAA with Microsoft for this specific reason
    - ...to help keep us secure.

Questions, Comments, Castigations?

Feel free to contact me at matt.dillon@uky.edu

You can also contact Steve Garner, Kelly Razor, Scott Wells, Chris Miles, Chris Canjar, or Cody Ortt to continue this conversation.

COLLEGE OF AGRICULTURE, FOOD & ENVIRONMENT
FY18 FEDERAL YEAR-END CLOSING SCHEDULE
(Unless otherwise stated, all deadlines are 4:30pm on the due date indicated)

AG Due Date	Type	Business Transaction	Dept.	Contact Information	
9/17/2018	Faculty Payroll Distributions	All faculty payroll distribution changes made via FES must be submitted by 12:00 noon. Any faculty payroll distributions submitted after this deadline that contain "OLD YEAR" federal funds will be returned. **All cost distributions should be updated with the "19" fund for payroll 10/1/18 and beyond.**	CAFE Business Center	Chris Fensin Melissa Horton	8-3906 7-4722	christine.johnson@uky.edu melissaj.horton@uky.edu
9/14/2018	Req/PO	Shopping carts/requisitions for purchases where the items will be delivered prior to October 1. This will help to ensure that PO's are created and goods received by Sept 30. It should also help to ensure that all accounting entries are posted to the "OLD YEAR".	CAFE Business Center	Unit Business Analyst	3-4499 7-4254 7-9833 7-7241 7-0132	Andrew.Gehring@uky.edu April.Lyons@uky.edu Jason.Hardin@uky.edu Tina.Navis@uky.edu Tina.Ward@uky.edu
9/24/2018	Monthly Payroll	MO #09 which ends 9/30/18 is the last monthly pay period for posting on the FFY18 fund. Please review all monthly staff and non-FES/DOE employees, and update 0027 screens accordingly for any payroll charges 10/1/18 and beyond. **a. Confirm payroll records for payroll periods on old year fund ending in "18"** **b. Create new records for period 10/1 – Beyond on new year fund ending in "19"**	CAFE Business Center	Chris Fensin Melissa Horton	8-3906 7-4722	christine.johnson@uky.edu melissaj.horton@uky.edu
9/24/2018	JV	All JV's making corrections to "OLD YEAR" postings should be completed and submitted to the Business Center. This should help to ensure they are posted by General Accounting before the month of Sept closes out. After this date, only the Business Center will be able to post JV's to "OLD YEAR". **Please mark all JVs "OLD YEAR" or "NEW YEAR" at the top of documents submitted to the Business Center from Oct 1 - Oct 15.**	CAFE Business Center	Unit Business Analyst	3-4499 7-4254 7-9833 7-7241 7-0132	Andrew.Gehring@uky.edu April.Lyons@uky.edu Jason.Hardin@uky.edu Tina.Navis@uky.edu Tina.Ward@uky.edu
No Later Than 9/30/2018	PO/Goods Receipts	All goods confirmations due for items received prior to, or on, September 30.	CAFE Business Center	Unit Business Analyst	3-4499 7-4254 7-9833 7-7241 7-0132	Andrew.Gehring@uky.edu April.Lyons@uky.edu Jason.Hardin@uky.edu Tina.Navis@uky.edu Tina.Ward@uky.edu
10/1/2018	Procard	All pro card editing for federal formula grants must be completed. This will help to ensure that all charges are posted to the appropriate year.	CAFE Business Center	Unit Business Analyst	3-4499 7-4254 7-9833 7-7241 7-0132	Andrew.Gehring@uky.edu April.Lyons@uky.edu Jason.Hardin@uky.edu Tina.Navis@uky.edu Tina.Ward@uky.edu
10/1/2018	Bi-weekly Payroll	BW #20 which ends 9/29/18 is the last full bi-weekly pay period for posting on the FFY18 fund. Please review all bi-weekly employees and update 0027 screens accordingly for any payroll charges 10/1/18 and beyond. **a. Confirm payroll records for payroll periods on old year fund ending in "18"** **b. Create new records for period 10/1 – Beyond on new year fund ending in "19"**	CAFE Business Center	Chris Fensin Melissa Horton	8-3906 7-4722	christine.johnson@uky.edu melissaj.horton@uky.edu
9/30/2018	PRD/Travel	All SRM/PRD Approvals and TRIP for "OLD YEAR" should be submitted for posting/processing on "OLD YEAR" funds. Any submitted after this date are not guaranteed to post to "OLD YEAR".	CAFE Business Center	Unit Business Analyst	3-4499 7-4254 7-9833 7-7241 7-0132	Andrew.Gehring@uky.edu April.Lyons@uky.edu Jason.Hardin@uky.edu Tina.Navis@uky.edu Tina.Ward@uky.edu

COLLEGE OF AGRICULTURE, FOOD & ENVIRONMENT
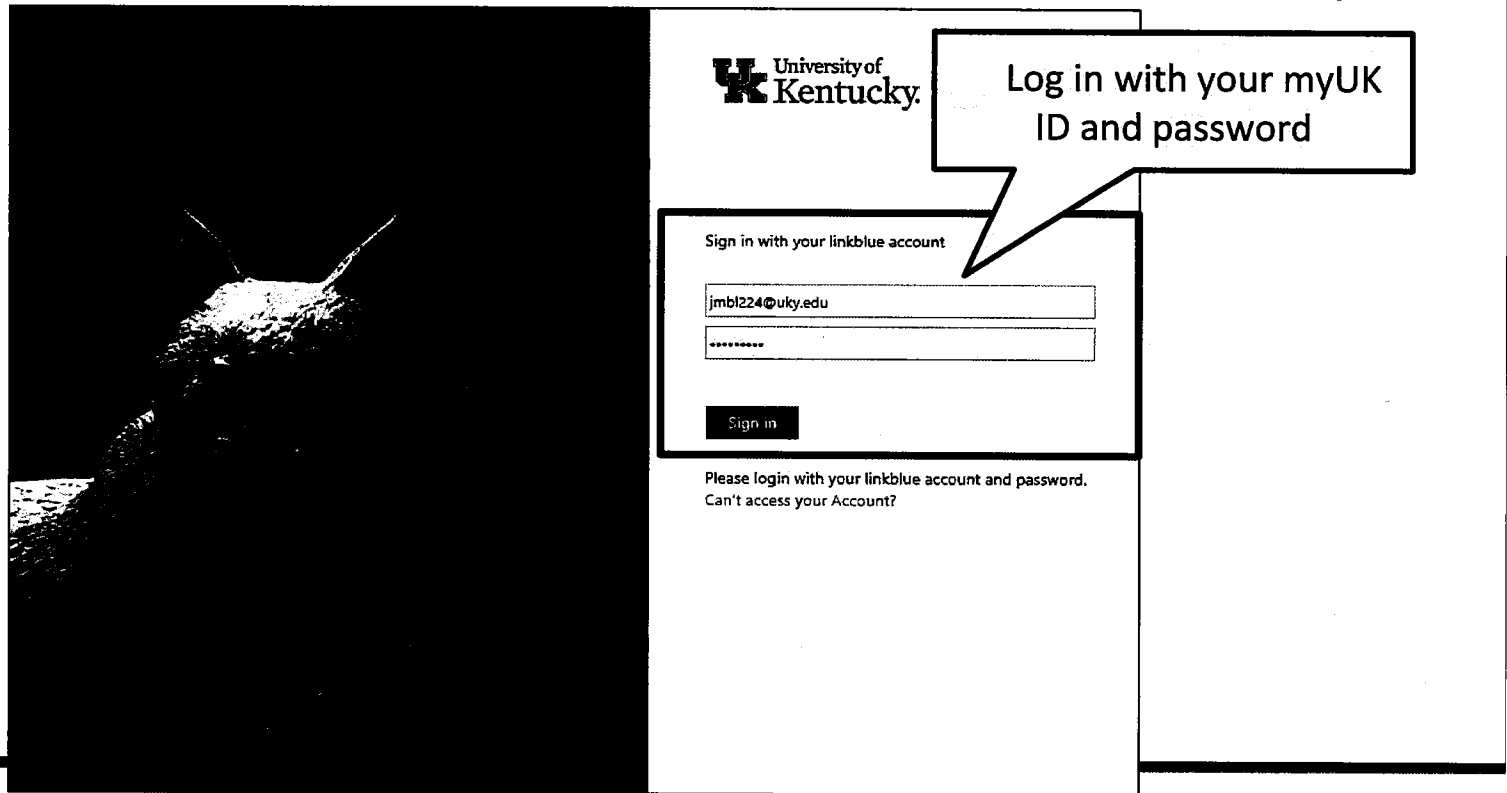## FY18 FEDERAL YEAR-END CLOSING SCHEDULE
(Unless otherwise stated, all deadlines are 4:30pm on the due date indicated)

AG Due Date	Type	Business Transaction	Dept.	Contact Information		
10/2/2018	Accruals	Any goods/services received or travel expenses made prior to Sept 30th for which you have not processed a payment document must have an ACCRUAL established.	CAFE Business Center	Unit Business Analyst	3-4499	Andrew.Gehring@uky.edu
					7-4254	April.Lyons@uky.edu
					7-9833	Jason.Hardin@uky.edu
					7-7241	Tina.Navis@uky.edu
					7-0132	Tina.Ward@uky.edu

NOTE: "OLD YEAR" documents submitted to the Business Center after the federal year-end deadlines referenced above may require a Business Procedures Exception Request form (http://www.uky.edu/eForms/forms/bpexception.pdf) be submitted to your business analyst via email.

Login To PaymentWorks

Login via the Single Sign-On (SSO) screen with your UK ID and password (the same as you do for any UK application)

University of Kentucky

Log in with your myUK ID and password

Sign in with your linkblue account

jmbl224@uky.edu

••••••••

Sign in

Please login with your linkblue account and password.
Can't access your Account?

University of Kentucky

PaymentWorks Tour

- To request a vendor be added to the University vendor database, start in myUK – Enterprise Services tab

. Navigate to Enterprise Services tab
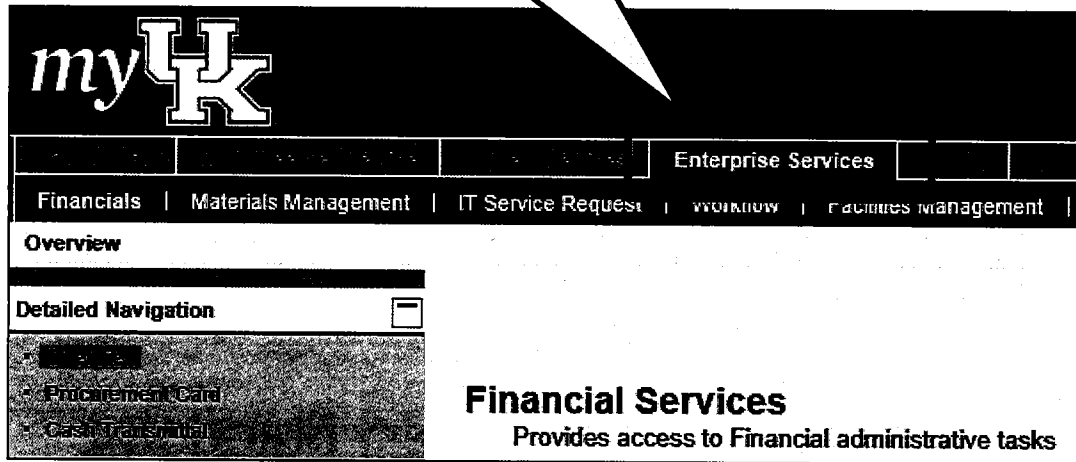
. Click PaymentWorks

University of Kentucky
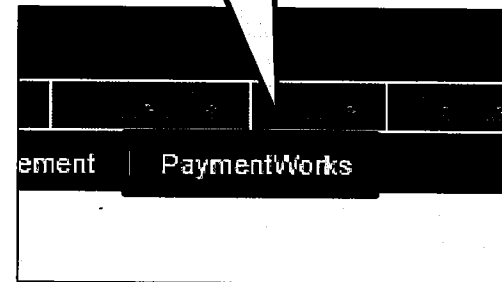
Arrive At PaymentWorks

The UK user will arrive at the PaymentWorks home screen and select Vendor Master Updates tile

Select Vendor Master Updates tile in the bottom left

University of Kentucky
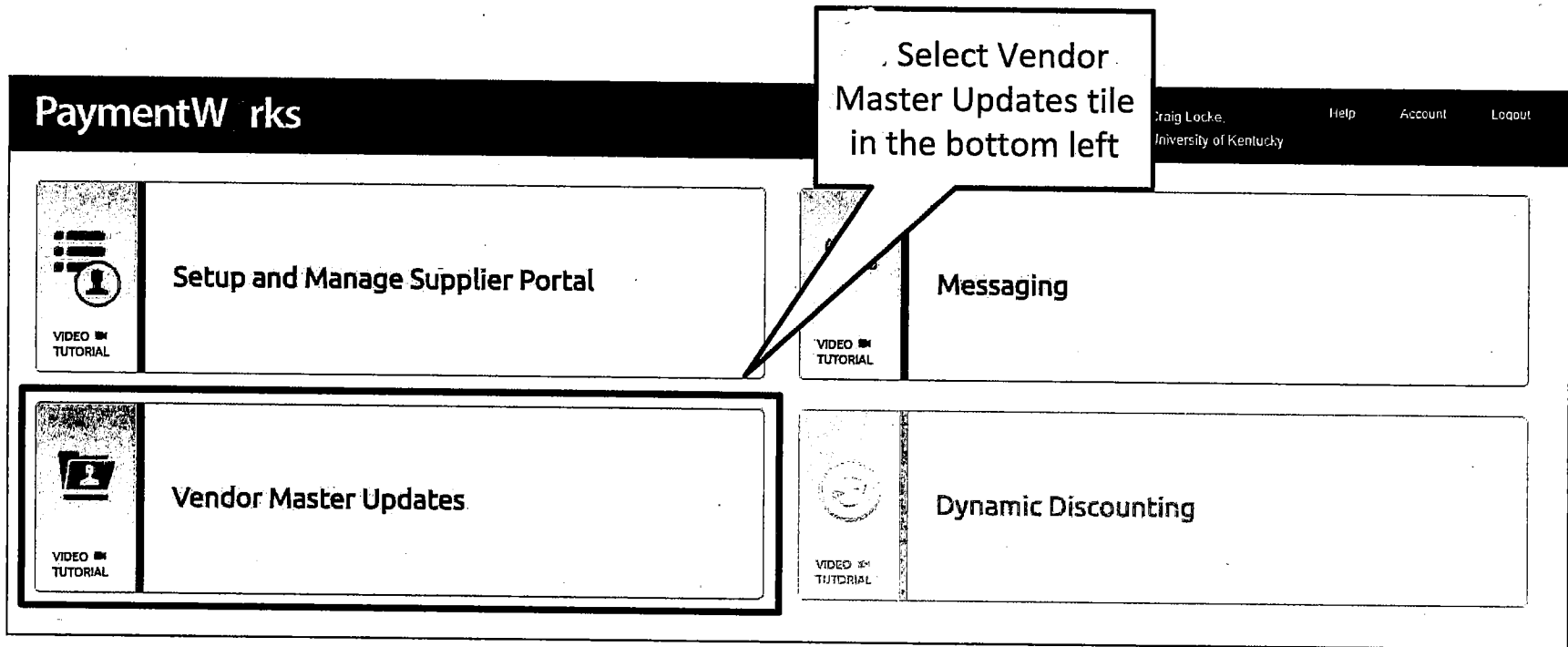
Send Invitation

The UK user sends an invitation directly to a vendor via email

. Click Send Invitation button

PaymentW rks — Vendor Master Updates

Home ✓ Updates New Vendors

SHOW: Onboardings ▼

	ONBOARD START	UPDATED	VENDOR NAME
	07/18/2018	07/19/2018	Smith and Webster Professional Services
	07/18/2018	07/19/2018	Huntington Specialized Robotics
	07/18/2018	07/19/2018	Nielson Company
	07/18/2018	07/19/2018	Albertson Cleaning Company
	07/18/2018	07/18/2018	Gaylord Library Supplies Inc
	07/18/2018	07/18/2018	Henry Schein Dental

Filter Results:
Vendor Name:
Vendor #:
Contact E-Mail:
Invitation Approval:
Invitation Delivered:
Account Created:
Registration Form:
Source:
Invitation Initiator:

Clear Filters

Send Invitation ...

University of Kentucky

Complete The Invitation

Complete the invitation to the vendor to become registered

Complete the invitation with their name, email, and message. Click Send.

Sending the invitation is the only step performed by the UK user

Invite New Vendor

Company/Individual Name:*

Jackson Engineering Supplies

Contact E-Mail:*

johnsmith@jacksonengineering.com

Verify Contact E-Mail:*

johnsmith@jacksonengineering.com

Personalized Message:

Please follow the directions and steps to complete the University of Kentucky vendor application process.

*Required Field

Cancel   Send

University of Kentucky

ECRT UPDATE

- <u>Pre-review</u> period lasts 21 days
- <u>Confirmation</u> period lasts 22 days

- <u>2017 STATS</u>:
  - 87% Pre-Reviews were completed on time
  - 93% Confirmations were completed on time

- If you <u>request a revision</u>—this sets off the off-cycle payroll. When you get an email from RFS that says the <u>off cycle payroll has run</u>—this is your clue to go in and pre-review again, then the PI will get an email saying they need to confirm.
- If you check <u>Revision Requested</u>, you have to make a correction to the payroll distribution, or the revision requested will just sit there until you do make a change.
- <u>How to stop all the emails to the PI's?</u> If all the statements are pre-reviewed during the pre-review period, the PI will get one confirmation period opening email. If the PI completes the confirmations in the first week, then he/she will not get any further emails. If the statements are NOT pre-reviewed in the pre-review period, the PI will get an email for <u>every single statement</u> that was pre-reviewed late
- <u>Confirmed Payroll Pending</u>—This is an adjustment that happens <u>after</u> a PI has confirmed. The PI will now need to go back in and confirm the statement.
- Notify the CAFE Business Center as soon as a PDEC resigns, AND, they must go in and pre-review all statements as these will NOT transfer to a new PDEC.
- PDEC's should look every pay period to see if there are any <u>Revision Pending</u> status that require additional action.
- PI's who have left or are on FML or Sabbatical should be forwarded to <u>ecrt.help@uky.edu</u> so a delegate can be identified
- We highly encourage communication between the PDEC and the PI—Look for statements in <u>Revision Requested</u> and <u>Revision Pending</u> statuses
- Every <u>payroll posting</u> and <u>journal voucher load</u> can change your previous statements, or generate new statements for previous time frames. Unfortunately, this email goes out to everyone on list serve, so it's important to check to see if you have a statement that needs action

- If you ever have a question, email <u>ecrt.help@uky.edu</u> for the quickest response

FY 19 Project Payroll Confirmation Schedule

July

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

August

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

September

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

October

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

November

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

December

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

January

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

February

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28		

March

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

April

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

May

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

June

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Legend

- Pre Review Period
- Confirmation Period
- Off cycle Processing*
- ERD Date Change
- Monthly Payroll correction deadline
- Bi-Weekly Payroll correction deadline

*In order for a person to be included in the off cycle payroll run, they must be monthly staff or faculty, and also must have the revise payroll checkbox checked on a project statement in ecrt.

STAFF PROFESSIONAL DEVELOPMENT FUND

THE STAFF PROFESSIONAL DEVELOPMENT FUND IS AGAIN AVAILABLE FOR THE FALL! SUBMIT BY SEPTEMBER 14, 2018.

The application is located at: http://cafebusinesscenter.ca.uky.edu/files/staff_professional_development_fund_request_-_cafe_-_080718.pdf

Requests and questions should be submitted to: agbusinesscenter@uky.edu

myUK Learning

myUK Learning is the new learning management system for the University of Kentucky.

myUK Learning allows users to manage their learning process by:

- Searching for items

- Registering for a scheduled offering

- Launching online self-paced learning

- Reviewing learning history

- Reviewing curricula or program status

- Monitoring staff's progress in assigned learning

Login to myUK Learning

Access myUK Learning via the myUK portal

- Login using your linkblue ID and password

- Select Employee Self Service tab

- Select myUK Learning

- Select Learning from the Home drop down menu
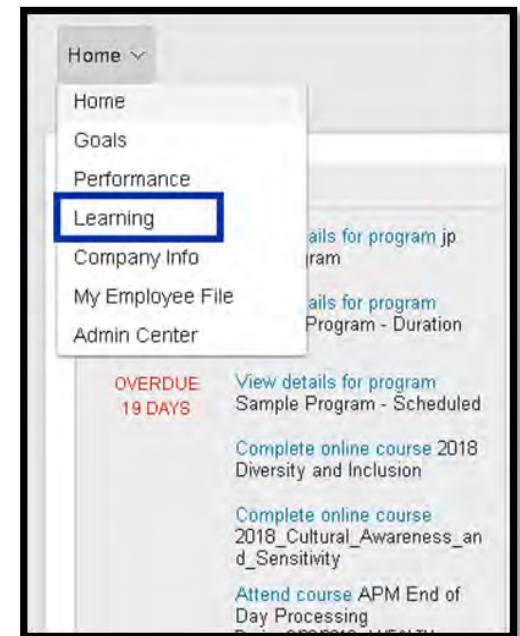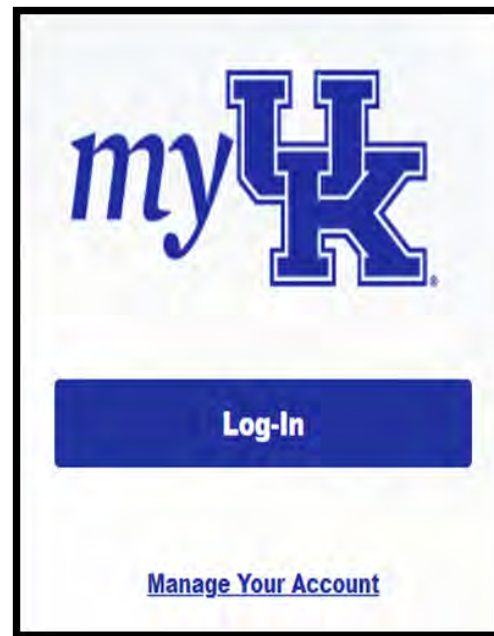
Learning Home Page

The Learning home page is the starting point within myUK Learning. The information found on this page is based on your position at the university.

Tiles provide quick access to information:

- My Learning Assignments
- Find Learning
- My Curricula
- Learning History
- Links
- My Employees (supervisor/manager only)
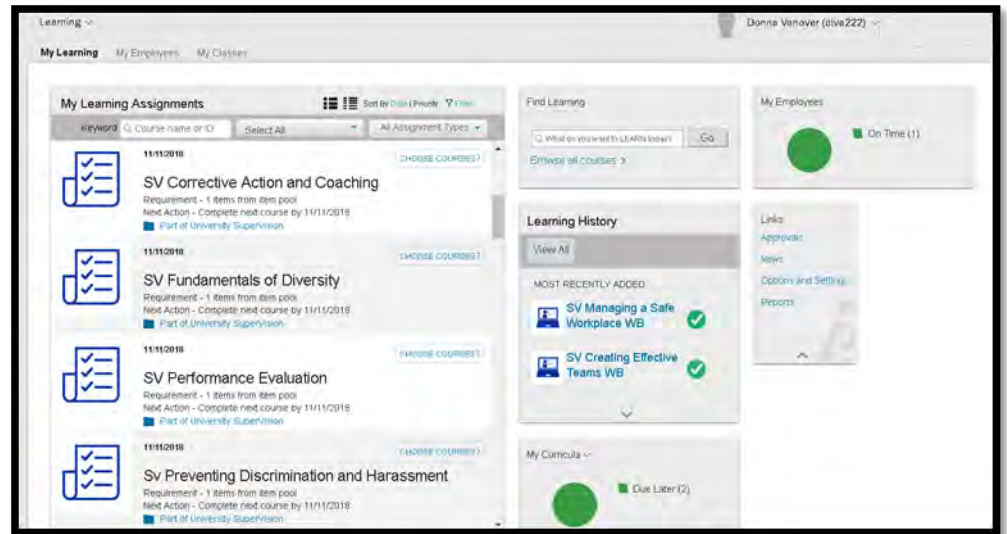
Learning Home Page: Tile Customization

Tiles on the Learning home page can be customized.

Move:

– Click in top border of tile

– Drag and drop in new location

Expand or shrink:

– Left click in top right corner

– Left click again to return to original size
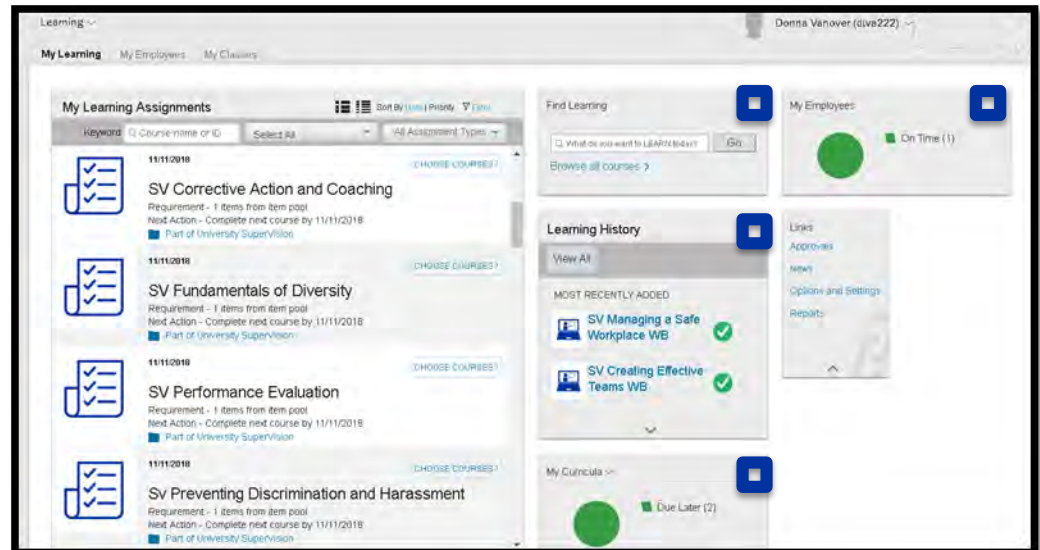
Learning Home Page:
My Learning Assignments

My Learning Assignments displays assigned learning activities grouped by due dates. Optional trainings don't have a due date.

By default, learning assignments are sorted by date. Click Priority to change the view.

Click Filter to narrow the list by entering a Keyword (Course Name or ID).

Further narrow the search by choosing Select All and Assignment Types.

Customize this tile by clicking:
- – Card View
- – List View
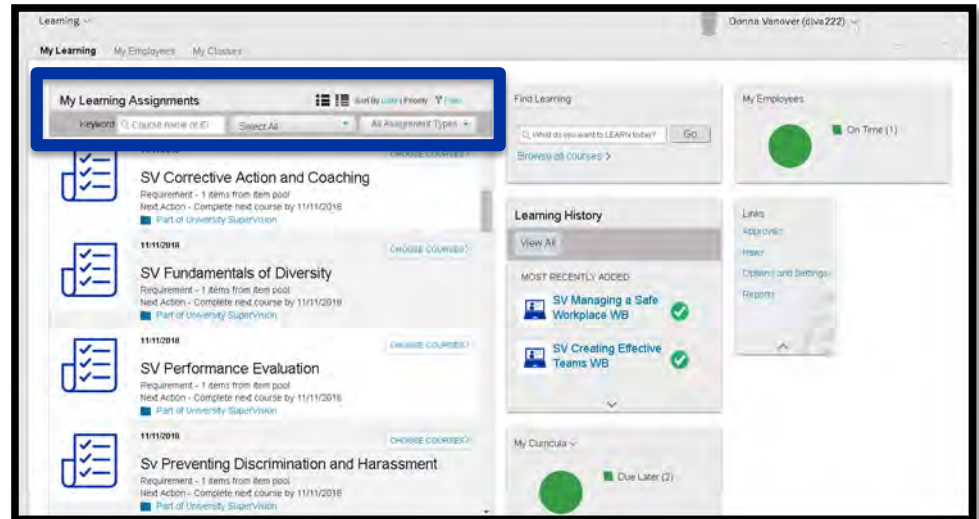
Learning Home Page: My Learning Assignments

Each learning activity is listed with status update and action buttons.

Actions include:

- View Program

- Start or Continue WBT

- Register for a scheduled offering of an item assigned to you

- Withdraw from scheduled offering

- View registration
  - Start date and end time
  - Location

Learning Home Page: Find Learning

Find Learning allows you to search for content within myUK Learning in one of two ways:

– Enter keywords into the text field and click Go

– Click Browse all courses to access the catalog
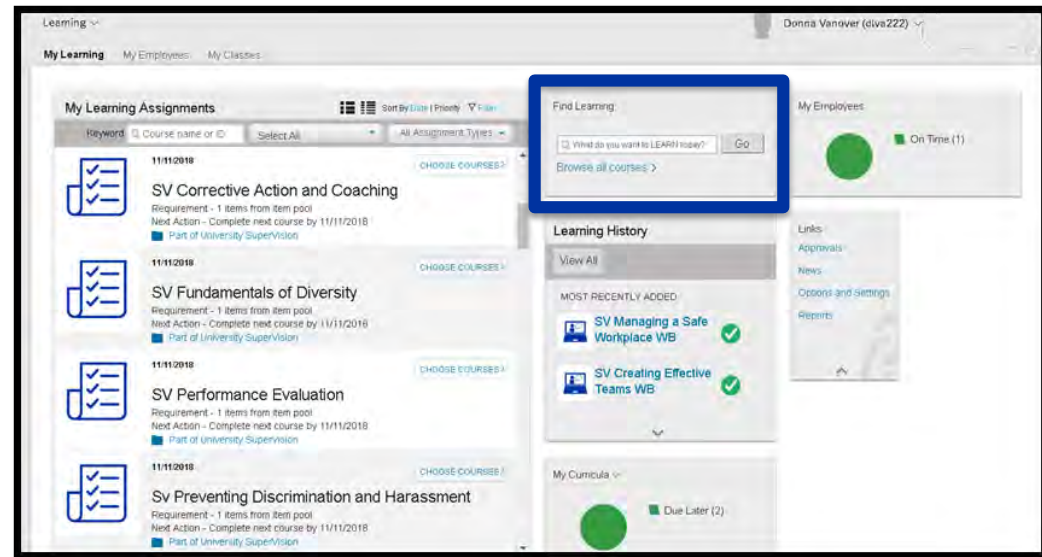
Learning Home Page: My Curricula

The My Curricula tile shows curricula assigned to you.

Each curriculum title links to the curriculum details page that includes:

– Items required to complete the curriculum

– Action drop down menus

– Sub-curricula associated

Curricula can have numeric priority levels assigned to them.

Learning Home Page: Learning History

Access your completed items by selecting the Learning History tile.

Click Learning History or click View All to view the Completed Work page.

Completed items can be sorted:
- By Date
  - After
  - Before
  - Between
- By Title

Learning Home Page: Links

The Links tile shows additional options available to you within myUK Learning.

- Approvals
  - Training requests
- News
- Options and Settings
  - Default settings
  - Supervisors can assign delegates
- Reports
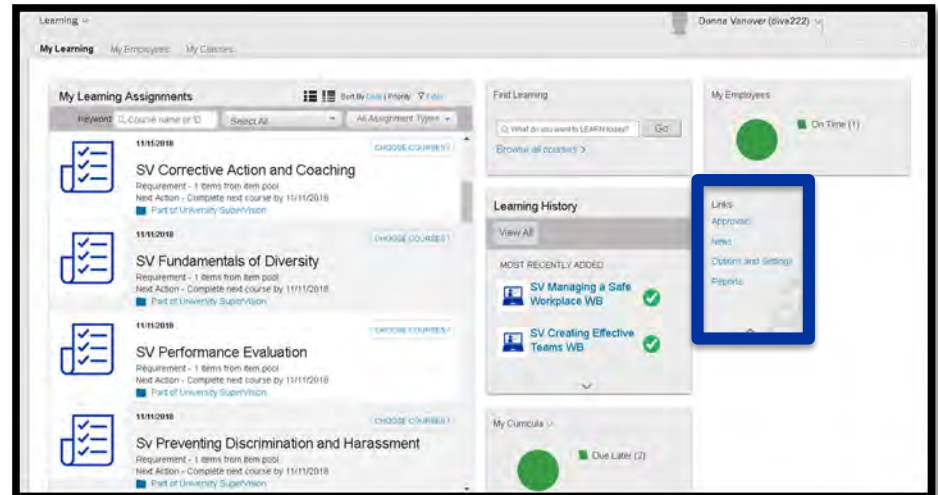
Learning Home Page: My Employees

The My Employees tile and the My Employees tab shows an overview of your employee's training status.

- Select an employee
  - Learning plan
    - Due within a month
    - Due later
    - Due anytime
  - Supervisor links
    - Assign/Remove training
    - Register/Withdraw
  - Status
  - Learning History

Course Types and Icons

Instructor Led Classroom & Virtual		**External Course**	
Online		**External Links**	
Blended		**Questionnaire Survey**	
Program		**Quick Guide**	
Curricula		**Task Checklist**	
Curricula Requirements		**Other**	

SAP/BW TRAINING PLAN
Quick Reference Guide

1. **On the myUK Launch Pad, click on "myHelp" on the left side of the screen.**
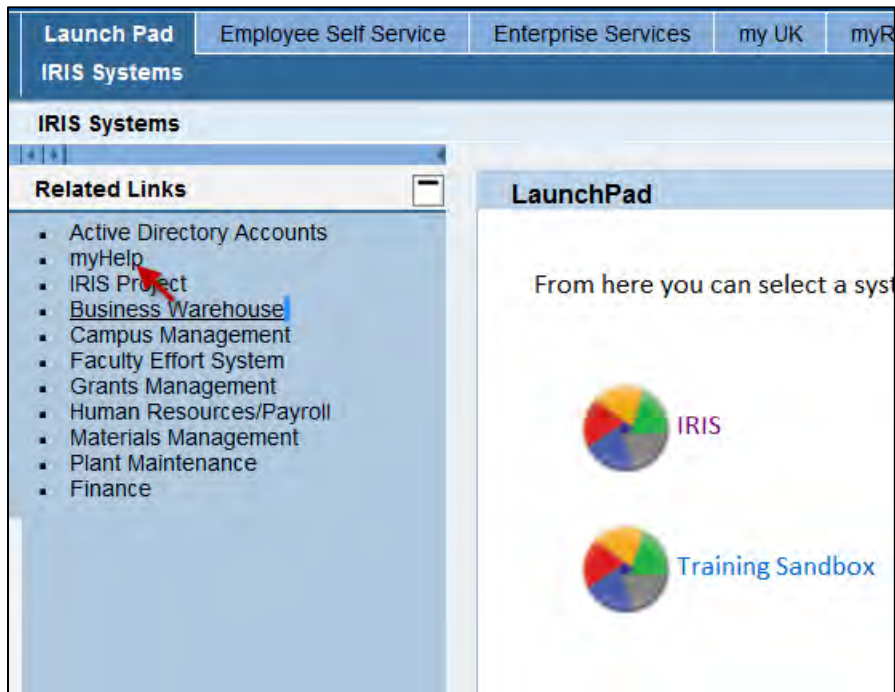
2. **Click on "Training Plan Request Form".**

3. In Section 1, enter **chris.shotwell@uky.edu** in the empty box (shown below) and then tab to the next section.

1. Approver/Area Security Officer (ASO)

Refer to the table below and enter the appropriate e-mail address. This is the e-mail address the IRIS Training Plan Request Form will be sent to when submitted for approval and further processing.

E-mail Address:

chris.shotwell@uky.edu

If the employee's UK Department Number begins with...	...enter this e-mail address:
H* or M*	patrick.ballard@uky.edu
1* or 3* or 9*	anthony.russell@uky.edu
4*	toni.smith@uky.edu
7* or 8* (Excluding 7H* and 81* - See below)	hrpike2@uky.edu
7H* (College of Medicine)	patrick.ballard@uky.edu
81* (College of Ag, Food, and Environment)	chris.shotwell@uky.edu
For SLCM access ONLY training plans...	**IRISSupport@uky.edu**

4. In Section 2, you will enter today's date (or the effective future date) in the date box and then select the appropriate employee category for the user. You may add optional notes in the "Comment" box (normally utilized for removal of a user's access or roles, but can be used for other purposes).

2. Reason for Training Plan

Enter the start/effective date and select the appropriate reason for submitting this training plan. Additional comments and/or special instructions can be noted also.

Start/Effective Date: (mm/dd/yyyy)

◉ **Brand New Employee**

○ **Rehired/Reinstated Employee**

○ **New Position for Employee**

○ **Additional Access for Employee in Same Position** (Select **only** the additional access being requested in the **Access Selection** section.)

○ **Access Removal** (List all access to be removed in the **Comments/Special Instructions** field below and do not select anything in the **Access Selection** section.)

○ **Other** (Explain in the **Comments/Special Instructions** field below.)

Comments/Special Instructions: (Maximum length = 500 characters)

5. In Section 3, enter the <mark>department business officer</mark> in the "Requestor Information". Any requests received that have not been submitted by the department business officer will be returned. Also enter all employee information in this section.

3. Requester and Employee Information

Complete all requester and employee information.
The requester must be the employee's business officer/immediate supervisor or designated College Contact.
The employee information can be found in their HR Master Data record (transaction PA20).

Requester Information

Name:

E-mail Address:

Employee Information

Name:

E-mail Address:

Link Blue ID: (i.e. jdoe222)

Person ID: (Enter all 8 digits)

Personnel Number: (Enter all 8 digits)

Position Number:

Position Title:

UK Dept Number: (i.e. 7A000)   If this is a STEPS employee, please enter the number for the department in which they're actually working.

6. In Section 4, you will select each course/role selection that the user needs, using the drop-down menus when necessary and paying close attention to the notes in red. Any questions about which courses are needed should be directed to Kim King in the CAFE Business Center. NOTE: There are many more courses than appear in this screenshot.

4. Access Selection

Select the required access the employee needs in order to perform their job responsibilities in SAP/IRIS for their current position.

Please select both courses for all employees.
☐ **Statement of Responsibility** (SOR)
☐ **IRIS Awareness & Navigation** (UK_100)

Business Warehouse (BW) / Business Objects (BOBJ)

☐ **BW Web Reporting** (BEX_300, BEX_300_A)
☐ **Business Objects for End Users** (BI_BOBJ_200)

Finance (FI)

☐ **Finance Overview** (FI_200)

7. In Section 5, you will click on the "Submit" button to submit the training plan to the Ag Business Center for approval and processing.

5. Training Plan Submission

Please verify that **all** sections of this form have been completed accurately, and then click on the **SUBMIT IRIS Training Plan Request Form** button below.

Any training plan received with incomplete information and/or insufficient approvals will be returned for re-submission.

Once IRIS Training has received and processed this training plan request, a confirmation e-mail will be sent to all employees listed on the form.

Caution: The **RESET Form** button will clear all fields and selections.

SUBMIT IRIS Training Plan Request Form   RESET Form

8. The user will receive an email notification when the training plan has been approved by the EAG training team.

BW/SAP TRAINING PLANS – Tips

➢ The department business officer prepares and submits (through the on-line web-based system) all BW/SAP training plans for their department's employees, except they cannot submit a plan for themselves. The business center will submit the plans for the departmental business officers in the college.

➢ For training plans for temporary (STEPS) employees, make sure that the individual is not in a pooled (group) position. Most of the time, you will need to contact STEPS and ask them for a unique position number for that individual if they need BW/SAP access, and you will use that unique position number on the training plan. Also, when entering the training plan, please use the CAFE department number that the individual will be working in. Do not use the STEPS department number.

➢ When requesting grant and BW access for principal investigators, the only access you need to request on the training plan for these faculty members are: Statement of Responsibility (SOR) and the FI_GM_200 (PI Grants Budget Overview) training, which is a web-based course.

➢ For SLCM (SAP's Student Module), please contact Jamie Dunn in the CAFE Center for Student Success.

➢ If any questions, contact Kim King or your business analyst in the Business Center.

Business Etiquette
Rules for Professional Success

University of Kentucky
Human Resources, Training and Development

Objectives

You probably know that it's important to be professional if you want to have a successful career, but what does that actually mean? After all, professionalism is rarely taught; you're supposed to pick it up on your own through a combination of observation and osmosis, but that's not always easy to do. In this workshop, we will focus on how to be and stay professional in a few ways.

Participants will learn to:

▸   Maintain composure when irritated
▸ Decline to react negatively when disagreeing
▸ Control negative reactions
▸ Avoid gossip
▸ Take personal responsibility
▸ Use personal technology sensitively
▸ Conform to common, implicit standards of office conduct

Take the High Road

▶ Control your reactions to negativity

▶ Don't respond in kind

▶ Remove yourself from tense situations

▶ Turn gossip Into something positive

▶ Don't laugh at offensive behavior

▶ Don't slack off

Don't Respond in Kind

Sometimes unprofessional coworkers might approach you in a hostile manner or to gossip. If you're trying to maintain your professionalism, it's important that you don't respond in kind.

This doesn't mean you should be a doormat and let people say or do whatever they want to you. It's perfectly okay and acceptable to stand up for yourself. Just know that responding in kind can add fuel to the fire. Remain calm and tell your coworker respectfully,

▸ "Please don't speak to me in that tone."

▸ "I'd rather not discuss that."

Remaining calm defuses many hostile situations. If a coworker gets loud and irate, yet you never raise your voice, they might realize their behavior is childish, unprofessional and unnecessary.

Your example can motivate others to modify their tone and approach people in a different manner.

Remove Yourself From Tense Situations

▸ Don't be a captive witness a coworker's bad behavior. If the situation starts to get ugly and you feel yourself losing control, step away.

▸ After walking away, your coworker might mock you. This is only to get a reaction out of you —don't fall for it.

▸ Stepping away from the situation might be the only way to maintain your professionalism. If not, you might lose your temper, and your actions will be no better than your coworker's.

▸ Once both of you have had an opportunity to calm down, approach your coworker to discuss the situation. Let him know why you stepped away, and then see if you can resolve the matter professionally.

Turn Gossip Into Something Positive

It can be tempting to add your two cents when coworkers gossip about others in the office. Just know that this is an unprofessional act.

Gossip can seem like normal office conversation, or even venting! But it can quickly tun hurtful.

There's a subtle way to approach this. If a coworker starts talking about another person negatively, you can steer the conversation in a different direction and bring up something positive about the person.

Do this enough times and others will get the hint. You can also remind coworkers that you're all on the same team. If they have an issue with another person, it'll be better to discuss this problem in private, squash the matter, and move on.

The truth of the matter is, even if you sit silently and don't say a word, it can appear as if you're agreeing with what's being said.

Don't Slack Off

In an unprofessional environment, your coworkers may have little respect for due dates and deadlines. They might complete tasks according to their own schedule, even if it puts the entire office behind.

Although everyone else may ignore due dates, you can maintain your professionalism by doing your part to keep everything on schedule. Missing a deadline decreases productivity for everyone, which can create more stress and chaos.

You can easily fall into a routine of ignoring deadlines if this attitude is present throughout the entire office. It's important to do your part and make sure your work is completed on time. Your hard work and effort won't go unnoticed. Your boss might not say so, but he'll make a mental note of your professionalism, which can open the door to better opportunities in the future.

Basic Citizenship

- ▸ Put "it" back where it belongs
- ▸ Indicate a re-order if you use the last of anything
- ▸ Start the next pot of coffee if you take the last cup
- ▸ Refill the paper tray in the printer. Return the machine to any standard setting.
- ▸ Pitch in and help others out if necessary

Working In Close Quarters

▸ Pay attention to *your* habits and quirks

▸ Practice healthy hygiene

▸ Be careful of "stinky" food

▸ Be aware of the impact of your cologne and scented products

▸ Don't be a noisy neighbor. Avoid the speakerphone and monitor your "noisy" habits

▸ Respect others' spaces. Don't intrude and don't borrow without permission

▸ Consider using plants as a visual barrier/sound buffer to preserve privacy and maintain quiet

▸ A small fan provides "white noise" to muffle distracting sounds

How to Respect Everyone's Space

1. Don't "prairie dog" Walk around the partition to see a neighbor, instead of popping your head over the top. As you walk down passageways, don't peek into every work station.

2. Pretend that open work stations have walls. Lightly tap on the wall at the opening, or say "Excuse me." Never assume it's okay to enter someone's work space unless invited.

3. Allow co-workers to complete calls. Don't interrupt with sign language or lurk. Drop a note or return later.

4. Grant your neighbors private time.

5. Move conversations from hallways.

6. Don't chime into conversations you hear over the wall. Ignore comments that aren't directed at you.

7. Turn down the volume. Mute any sound effects on a screensaver, set phone ringer on low, set personal devices to silent and minimize the volume of computer alarms.

Balancing Your Personal and Professional Image

Personalizing office space is tempting. Don't let your personality overwhelm your professional image.

 Consider these questions:

1. Who will view my space?
2. What does it say about me?
3. Is my space distracting?
4. Is the décor "too much"?
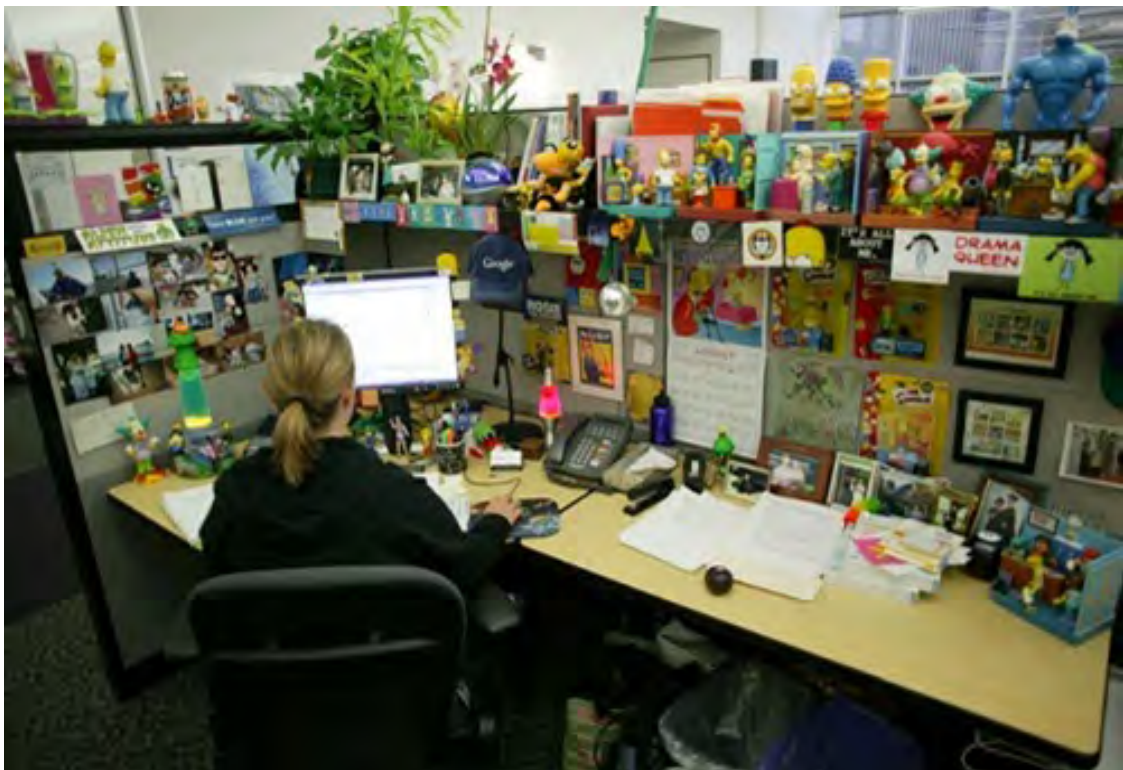
Friends and Family: Case Study

I work in an administrative position at a university, and I almost always have Google Chat open throughout the day, both to talk to coworkers and friends outside of work. Is this generally considered more acceptable than other forms of personal messaging? I'm a pretty productive worker – I very rarely make personal calls at work, and I would never dream of texting people from my phone or Facebook all day. G-chat feels different to me, but should it? Things are very casual where I work, and most people have their personal Gmail/Facebook up throughout the day. Does it all just come down to workplace culture? Is it the Millennial in me?

Friends and Family: Case Study

I have a coworker who lives a good distance away and carpools with her husband to and from work each day. Her husband was recently laid off, but is still driving her to and from work each day. My coworker is now requesting that he be allowed to "hang out" in the office for a couple hours in the morning in order to allow time for traffic to die down, so his return trip home is not as difficult. This would apparently include afternoons, as well, in that he would arrive early and stay in the office until they are ready to depart for home.

We are a relatively small office, so his presence would not go unnoticed. I don't believe he would cause too much distraction, but I don't feel it's appropriate for non-staff individuals to occupy a spot in the office during business hours on a fairly consistent basis. I'm worried it would also set a precedent for others in the office, should they too wish to have a spouse, relative, or friend come into the office for extended periods.

Kitchen Duty

One of the most offensive things an employee can do is steal food from the office fridge! A shared space doesn't mean shared rations.

Here are some ways to maintain your professionalism, even in the office breakroom or kitchen!

▸ Label your containers/frozen meals

▸ Take only what belongs to YOU

▸ Remove/dispose of your leftovers promptly

▸ Cover your food in the microwave and wipe down the interior when you are finished heating up your lunch.

▸ Wash up and put away cups, plates, and utensils.

Technology: What is Acceptable?

For many Americans, cellphones are always present and rarely turned off — and this constant connectivity creates new social challenges

- Who has cell phones?
- Where are they?
- When do you turn them off?
- How many times have you checked them during this training? During this meting?
- *What* were you checking on your cell phone?

Etiquette Tips for Using Your Phone on the Job

Put Your Phone Away

If your employer doesn't ban cell phones at work, you shouldn't use one so much that it gets in the way of doing your job. The best way to avoid temptation is to keep your phone in a desk drawer. Since your boss hasn't prohibited its use, you can check your phone occasionally to make sure you haven't missed any critical calls.

Turn Off Your Ringer

Silence your ringer. If you put your phone on vibrate and have it in your pocket, it will let you know when you have a call or text without disturbing your coworkers. It will also keep your boss from knowing how many calls you get at work. Alternatively, you can buy a smartwatch and have it alert you to incoming calls and messages. Some activity trackers can be set to work with your phone too.

Use Your Cell Phone for Important Calls Only

Save those casual conversations for after work hours or your break. There are very few calls that can't wait. If the school nurse is calling to say your child is ill, you should deal with that as soon as possible. Almost any boss would be understanding about answering a call when there is a family emergency. However, if your BFF wants to talk about weekend plans, do it from home.

Etiquette Tips for Using Your Phone on the Job

Let Voicemail Pick Up Your Calls

Instead of answering any calls immediately, you have the option of letting all of them go to voicemail. If someone is calling because of an emergency, he or she will say that in the message, and you can call back as soon as you get it. But if it isn't urgent, you can wait. The benefit of doing this is that you don't have to waste time trying to get off the phone, especially if the caller is reluctant to hang up.

Find a Private Place to Make Cell Phone Calls

It's okay to make personal calls when you are on break, but if you share a workspace do it in another area. Look for a spot where no one can overhear your conversation, even if what you are discussing isn't personal. Your coworkers may not be on break, and your chatter could interrupt their workflow.

Don't Bring Your Cell Phone Into the Restroom ... Ever

Please follow this rule regardless of whether you are using your phone at work or elsewhere. Why? Well, if you must ask—you never know who is in there; the person on the other end of the line will hear bathroom sounds, e.g., toilets flushing; respect your coworkers and don't invade their privacy.

Etiquette Tips for Using Your Phone on the Job

<u>Don't Look at Your Cell Phone During Meetings</u>
In addition to using cell phones to talk or text, they have become an essential work tool. With that in mind, this rule should read "Don't Use Your Cell Phone at Meetings If You Are Going to Use It for Anything Unrelated." Use your apps as needed—for example, to add things to your calendar or take notes. However, while you are sitting at a meeting, do not text, check your social media news feeds, post your status, or play games. Don't bury your nose in your phone. Keep your eyes up and stay engaged. Doing anything else will be a clear signal to your boss that your mind isn't completely on the business at hand.

"Etiquette requires us to admire the human race." – Mark Twain

Thank you for participating in today's workshop!

Michelle Jones
Senior Training Specialist,
UK HR T&D
859-257-1425
michelle.jones2@uky.edu

Resources Consulted

‣ **8 Business Etiquette Tips Everyone Should Follow by Amy Arndt. The Huffington Post. Updated March 29, 2014**
http://www.huffingtonpost.com/amy-arndt/8-business-etiquette-tips_b_4665674.html

‣ **14 Tips on Business Etiquette: Setting a Professional Tone with Co-Workers, clients, and customers. Special Report from BusinessManagement Daily.**
http://www.businessmanagementdaily.com/glp/28411/Business-Etiquette.html

‣ **The Price of Incivility by Christine Porath and Christine Pearson, January-February 2013, online Harvard Business Review.**
https://hbr.org/2013/01/the-price-of-incivility

Topics to Avoid at Work

Religion

▸ Religion is a very personal issue and people are very sensitive about it. They don't want to hear that you disagree with their religious beliefs or that you believe your religion is the one in which everyone should believe.

Politics

▸ While you may feel very strongly about your political party or candidate, or have negative views about the opposition, you should not try to win your co-workers over to your point of view.

Your Sex Life

▸ Your sex life is no one's business other than yours and your partner's. it makes people uncomfortable. It may even border on sexual harassment.

Problems With Your Spouse, Your Children, or Your Parents

▸ When you discuss problems you are having with others, people may wonder if those problems are distracting you from doing your job.

Your Career Aspirations

▸ Talking about how you want to move on to something bigger and better will make everyone question your focus to your current job. Do your job exceptionally well, and of course, let your supervisor know you want to move up, but don't make it the topic of workplace conversations with anyone who will listen.

Your Health Problems

▸ Don't dwell on your health problems at work. If you do, you will give everyone reason to wonder if an illness will keep you from doing your job. Moreover, it may sound as if you are using your health problems as an excuse to do less.

▸ Of course, serious health issues that will cause you to take time off, must be discussed with your employer. No one, however, needs specific details about your health

First Impressions Matter

You represent the University of Kentucky. Your appearance is the first thing others notice about you and our institution. Consider this:

- Wear clothing appropriate for the job
- Make sure you are well groomed
- Maintain a professional, open demeanor
- Keep staff conversations to a minimum in public areas
- Keep your voice low in public areas- conversations with customers should be confidential
- Be respectful to diversity and differences

UK Human Resources
Training and Development

10 Do's and Don'ts of Proper Email

- **DO** ask yourself: "Is this the best way to communicate what I want to say, or should I pick up the phone and talk face-to-face?"

- **DO** include a meaningful Subject Line to capture the reader's attention and to summarize the body of the email.

- **DO** slow down before you start typing. Think about what you want to express in your email versus reacting to what you've read.

- **DO** communicate the response you want. Let people know how you would like them to respond, by when, and include your contact information.

- **DO** read your email out loud before you send it. This allows you to catch any spelling mistakes and get a sense of the tone of your writing.

UK Human Resources
Training and Development

Email Do's and Don'ts, (Cont.)

- **DON'T** overly use emoticons. They are useful to help cue the reader, but too many give the email an unprofessional look.

- **DON'T** put several points in one email. Send an email for each point if the topics are entirely separate.

- **DON'T** use a patterned background. It makes emails difficult to read, and can lead to misunderstanding.

- **DON'T** type in the TO: field until you have completed and are ready to send the email.

- **DON'T** type in ALL CAPS. All capital letters in an email indicate that you are shouting.

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