THE UNIVERSITY OF TENNESSEE
HEALTH SCIENCE CENTER.

# Campus Wide Business Managers Meeting
# February 12, 2025
# 1:30pm – 3:00pm

Please use the sign-in sheet or type your full name and personnel number in the Zoom Chat for HR128 credit.

# Agenda

- DASH Updates
  - Mike Ebbs, Associate Vice Chancellor – Financial Strategy
- DASH Q&A
  - Chandra Alston, Vice Chancellor – Human Resources
  - George Ninan, Associate Vice Chancellor – Financial Operations
  - Keysha Fuller, Director – Procurement
  - Lisa Hall, Functional Leader – DASH Maintenance Project

# DASH Updates

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# Dash Updates

- ## Retro Position Changes
  - Position changes are being made for prior pay periods. Payroll processing for the current period recoups and/or removes the hours and absences entered by the employee. This results in no time entered, a negative pay, or partial pay. Position changes must be forward-looking and entered in advance of the pay period starting for employee transitions, etc.

- ## Additional Pay Workflow
  - Individual compensation (aka additional pay) submissions go to multiple people as defined by Area of Responsibilities. Nearly 400 have been submitted, many of them are stuck in workflow and cannot be approved. This issue has been escalated, and the team is working to identify and prioritize those the next payroll.

# Dash Updates

- ## Marketplace Single Sign-On
  - The recent change to preferred email address in DASH has introduced an error when attempting to place an order in marketplace catalogs. There is a discrepancy between the email address sent by single sign-on and what is stored by marketplace vendors such as Amazon and Kelsan. The team is working to identify best method to resolve the discrepancy.

- ## Labor Distributions
  - Must consider impact of
    - Technology Allowances
    - Additional Pay or Extra Service Pay
    - Any type of pay is processed through the current labor distribution schedule

# Dash Updates

- Labor Distribution Example
  - Employee – John Doe, Salary – $5k/month
  - 50% distribution – Grant A
  - 50% distribution – Unrestricted account

| Employee | 5,000 | Labor Distribution | Amount |
|---|---|---|---|
| | | | |
| John Doe | Grant A | 50% | 2,500 |
| | Unrestricted Account | 50% | 2,500 |

# Dash Updates

- ## Labor Distribution Example
  - Employee – John Doe, Salary – $5k/month
  - Employee receives $1,000 spot bonus.  Not allowable on grant.
  - 50% distribution – Grant A
  - 50% distribution – Unrestricted account
  - If no change in labor distribution the amounts would be:

| Employee | 6,000 | Labor Distribution | Amount |
|---|---|---|---|
| | | | |
| John Doe | Grant A | 50% | 3,000 |
| | Unrestricted Account | 50% | 3,000 |

  - Incorrect amount charged to grant

# Dash Updates

- Labor Distribution Example
  - Employee – John Doe, Salary – $5k/month
  - Employee receives $1,000 spot bonus.  Not allowable on grant.
  - 50% distribution – Grant A
  - 50% distribution – Unrestricted account
  - Need to change the change labor distribution:

| Employee | 6,000 | Labor Distribution | Amount |
|---|---|---|---|
| John Doe | Grant A | 41.67% | 2,500 |
| | Unrestricted Account | 58.33% | 3,500 |

  - Correct amount charged to grant

# Dash Updates

- Labor Distribution
  - Please make sure that all labor distribution changes are complete and fully approved by the time payroll is run.  If not, the charges will be delayed posting to the accounts.
- Security
  - Continue to send requests to Accounting and Budget per email
  - GL Journal entry role will roll out soon
  - Please clear cache to reflect changes in security

# DASH Q&A

# Human Resources

1. What is the proper way to enter OT on the biweekly timesheet if the OT is going to be paid from a different account than the person is usually paid from?
2. When there is a mistake on a new or modified position and the approver rejects it, is the transaction sent back to the originator for corrections? If so, where does the originator go in DASH to find the transaction?
3. Is it possible to download/forward job applications/resumes electronically to search committee chairs?
4. Can instructor-led DASH performance evaluation classes be recorded and made available?

# Human Resources

5. When setting up a new position, we are asked if the position is budgeted. If we say no and then enter a budget amount, will that amount increase the salary budget for that account? If we say yes, is the salary budget not changed? If we want a position to remain unbudgeted until the person is hired, should we leave the salary box empty and include in the notes an anticipated salary?

# Human Resources

6. Will we be shown the best reports to use for monitoring/maintaining/reviewing our positions/salaries/pay checks/etc.? Please see the questions below.

- In IRIS, we ran the Department List of Employees (ZQR_DEPT_List) report which provided employee (position and salary) data . We cannot find an equivalent report is DASH. We were able to find the Employee FTE Report in DASH, but it doesn't include the salary details.
- It is our understanding that we should run the Labor Distribution report after each pay period to verify employee time/pay. This report is somewhat cumbersome (maybe we are not running it properly), but is there another report that provides pay totals and not pay for each day of the pay period?
- Does DASH have an equivalent report to the IRIS Salary Budget Position Detail Report (ZSBUD_DET)? This report lists all positions in the unit whether they are vacant or filled and provides position and salary data.

# Human Resources

7. Sometimes when an approver submits an entry in DASH (example - additional pay request), it is returned to originator for approval. If the entry is reassigned to another approver, it is returned to originator a second time for approval. Is this the standard workflow?

8. How do I request DASH access to needed processes?
   - Example: I do not have access to any CHIPS team members, consequently, I cannot review time entry/approvals.

# Accounting and Budget

1. How can we request DASH training on accounting and budget reporting (budget vs actual reports, ledgers, etc.)?

2. How do I request DASH access to needed processes?

   a. Example: I am the CHIPS administrator, but I do not have access to process payments for our Standardized Patients.

   b. Example: I do not have the ability to “create journals” from the General Accounting Dashboard. I need that to, again, just an example, process internal transfers.

# Procurement

1. When a staff member enters a request, it goes straight to Campus Purchasing for approval and bypasses the departmental Business Office. The departmental Business Office is not able to review the purchase for accuracy before hand or update the receiving of the items. Can workflow be adjusted to route to departmental business offices as well?
2. How can delivery addresses be updated to locations other than what is tied to our name/user id in the system?

# Facilities

1. How are key requests initiated and processed? Info on Facilities website still has Archibus info: https://www.uthsc.edu/facilities/key-control.php
2. After GO LIVE, many Facilities requests were routed as chargeable items;  however, we were not paying for them in the past (examples - moving furniture, signage).  If the units are required to pay for the work, will a cost estimate be provided as part of the approval workflow? If this issue has been resolved, please disregard the question.

# When to submit a Work Request for Facilities

- To request a repair
  - Light flickering in a hallway
  - Leaky faucet
  - Stained ceiling tiles
  - Key request
- To make a special request for service
  - Move equipment
  - Setup for an event
- To request a project
  - Remove a wall
  - Renovate a space

# How to Submit a Work Request to Facilities Using DASH

1. Start on the DASH Landing Page (Duo authentication may be required).
2. Select the Maintenance Work Request UTK & UTHSC button to access your personal project/work request dashboard.
3. Your dashboard defaults to displaying all project and work request submissions you have entered or requests that have been entered on your behalf.
4. You can toggle the 'Show All Requests' button to 'ON' to display all project and work request submissions. This will be useful if you need to verify whether a submission has been entered for a specific asset.
5. Select the '+ Add New' button in the upper right corner to enter a new project or work request submission. This will open the 'New Request' dialogue box.

# How to Submit a Work Request to Facilities Using DASH, cont'd.

6. Scroll down to Submit the project or work request or to reset the 'New Request' dialogue box.

7. When a project or work request has been submitted that may be chargeable, the status will be 'Pending Approval.' If the request does not need to be approved, it will send automatically to DASH Maintenance, where the Work Order is created for Facilities. The status will change to 'Open.'

8. Click **>** beside the asset to see more information.

9. Note the Work Order number that was created in DASH Maintenance for Facilities.
   - Non-chargeable work requests will receive a work order number immediately.
   - Chargeable work requests will receive a work order number once the approval has been completed.

10. Check back in the portal for status updates, including: Open, In-Progress, Pending Approval, On Hold, Rejected, Completed & Verified, Closed

11. Search box, Sorted By, Order By, and Show All Requests buttons at the top of the page allow the user to filter the work requests.

# How to Approve a Work Request

To approve work requests, the approver will receive an email. They will log into the work request system and, at the top, click on the approver button at the top near the left. That will open the approver page, and then they will click on the approve or reject button next to the Work Request. Once the work request is approved, the work order is created in DASH for the Facilities staff to begin work.

To see details, the Approver can go into the Work Request by returning to the FACILITIES PROJECT/WORK REQUEST tab and clicking on the pencil to the far right of the selected work request. This allows the Approver to edit the information on the work request. The Approver should validate the accuracy of the following fields:

- Asset selected
- Reason for Repair
- Department – This is the department that will be charged for the repairs if request is chargeable.
- Fund – This is the fund that will be charged for the repairs if request is chargeable.
- Description

If the approver does not support the request or is not willing to pay for the request, the request can be rejected. Return to the Approvals tab to approve or reject the work request.

# Resources

- Facilities: Submitting a Work Request in DASH
- https://uthsc.teamdynamix.com/TDClient/2280/Portal/KB/ArticleDet?ID=154597
- For assistance or emergencies, please contact the Facilities Service Desk at 901.448.8888.

# Glossary

The following information describes each field on the ‘New Request’ dialogue box:

- **Campus:** A required field that should default to your specific campus based on your work location associated with your Net ID.
- **Asset (Location/Equipment):** A required field where you choose the name of a specific building, floor, or room where the work needs to be completed. The naming convention associated with spaces is Building Name-Floor-Room Number-Equipment. You can also use a % character as a wildcard. For example, you can enter Alex%656 to find that specific asset in the drop-down menu. The more specific the requestor can be in the selection of the asset, the easier it will be for Facilities Services to provide faster service.
- **Reason for Request:** A required field where the requestor enters the reason for the service request. An example of a reason for request is ‘Auto:  Request tags for new vehicle.' If a service request may be chargeable, a notification will appear below the Reason for Request field and an approval by the Department approver will be necessary for the request to be submitted to Facilities Services.
- **Requested For:** A required field where the requestor’s name is entered. This should be the name of the person who Facilities Services can contact in the event the service provider has questions about the request. This defaults to the person logged in but can be changed. You can use Autofill by deleting your name and typing the other person’s last name, first name. When a match is found, click on the name.

# Glossary, cont'd.

- **Department:** A required field to capture the 'Requested For' person's department or the department that will be charged for the request. The associated department charge code is connected to the department selection. A component of the chart of accounts. **UTHSC departments all start with "70."** Be sure to select the correct Department.

- **Fund:** A required field to capture the fund to be charged for the work. A component of the chart of accounts. **Be sure to check with your Business Manager for the correct Fund.**

- **NOTE:** Additional segments of the COA will be added in the near future to improve the accuracy of the funding information at the start of the process.

- **Description:** Please enter as much detail in this field for the reason for the request. The more detail in the description field can help the Facilities Services staff respond quickly and efficiently. **If the room isn't part of the asset description, add it in the description.** A good example is, 'I need to replace the carpet in the office suite 123 in Coleman'. **NOTE: This field has a 250-character restriction.**

- **+ Attachments Button:** This button can be used to attach photos or drawings to the work request to help clearly show reasons for requests.

# Final Thoughts

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