Weekly Status Call

May 28, 2020

Training Courses
Available Now

Reminder

Course:	Information:
Understanding Accounts Receivable, Deferred Revenue and Carry Forward Calculation	• Recording coming soon to the Training Library!
Faculty Contracts	• Updated for 2020 • Available in the Training Library
Amazon Punchout	• All new with Amazon Business information. • Posted in the Financial Management System portion of the Training Library.

University Human Resources
Training and Development

Reminder

Online Summer Schedule

- Registration is now open via the [Professional Education Portal](#)

- Over 60 courses offered via Zoom: now – July 31

- Classes from campus partners – thank you!

- Specialized classes for the summer of COVID-19: well-being, remote working, learning circles, leadership and discussion groups

- [List of current courses and dates](#) available on the [Training & Development website](#)

- More resources coming throughout the summer to support campus reopening

Training
Continuing Education

Reminder

GA Center offers 10 <u>free</u> continuing education courses through June 30!

- Free, <u>self-paced online courses</u> are now available to the public from the University of Georgia Center for Continuing Education & Hotel.

- These courses cover a variety of hard and soft skills.

- Apply to workers across a wide range of industries and fields.

Fiscal Master Calendar
Upcoming Downtimes/Updates

Access the Fiscal Master Calendar for additional dates and information!

Weekly Status Call
Update

- Moving to Zoom Webinar beginning July 2, 2020.

- Updated link will be distributed soon.

- Who needs to be added to invite list?

Financial Management System
Upcoming Release Notes
June 6

Accounts Payable

Update to the invoice number field when submitting a payment request

- Only **letters**, **numbers**, and **spaces** will be valid characters to use within the invoice number field when submitting a payment request. Special characters should no longer be used in this field as they can cause downstream issues with ACH payments.

- For any re-occurring monthly payments (such as utilities) please include your account number as needed, the abbreviated month, and the last two digits of the year.
  - Example – **123456 JAN 20**

Budget Management
BPSS Update

- BOR has not yet provided FY21 Budget Information to institutions

  - Planning for quick communication and action once we receive information from BOR.

- Continue staying current on position funding.

Accounting
Get a Jump on Month-End and Year-End

- May Month End
  - Please have all GL Journals through Department Workflow Approval process by **NOON, June 1 (Monday**!).
- Account Balance Reviews for Asset/Liability/Revenue/Expense Account Codes
  - Use *UGA_GL_LEDGER_BALANCES* to look for "opposite" signs overall
  - Use *UGA_GL_LEDGER_DETAIL* or *UGA_GL_TRANSACTIONS* to identify specific transactions that are causing the variance.
  - Assets/Expenses should have a "POSITIVE" balance so look for "NEGATIVE" transactions
  - Liabilities/Revenues should have a "NEGATIVE" balance so look for "POSITIVE" transactions

Data Warehouse
Monthly Status Report

- Due to server updates currently taking place, the Monthly Status Report (MSR) did not update last night.
  - A fix is currently being worked on.
- In the meantime, data is good through Monday, May 25.
- The Budget Status Report (BSR) and the Budget Status Cube are both fully operational and can be used as alternatives to the MSR temporarily.

Resolved

Data Warehouse
Project Status Report – Best Practice Tip
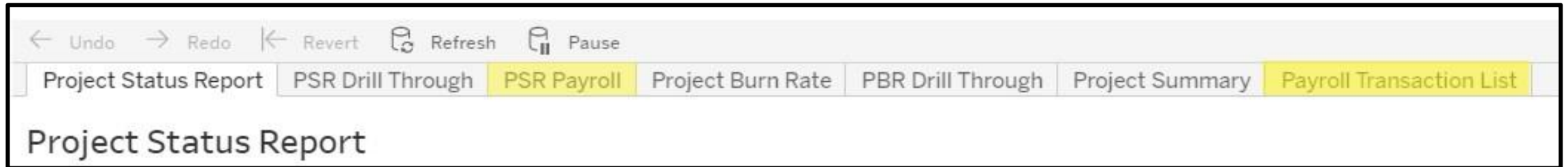
- The payroll tabs on the Project Status Report have different purposes.
- The PSR Payroll tab is designed to be used as a drill-through from the PSR Drill Through tab for individual payroll transactions.
  - Best Practice: Use this tab to view details on individual payroll transactions.
- The Payroll Transaction List is designed to give you full payroll data from OneUSG Connect.
  - Best Practice: Use this tab to see summary payroll amounts by person.

Data Warehouse
Project Status Report Update

- Fund Code has been added as a column and a filter in the PSR's Payroll Transaction List tab.

Data Warehouse
Upcoming Budget/Project Cube Changes

- **What:** Data source change will take place on **Friday, July 10**.

- **Reason:** To improve the accuracy of project reporting and add additional data/detail/features to the cubes.

- **Impacted Reports:** Budget and Project Status Cube, Budget Status Report, Project Status Report, Monthly Status Report, and the financials transaction log.

- **User Impact:** This will mean a new download of the cube, not just a filter change. In addition, saved views and subscriptions in the BSR, PSR, and MSR will need to be rebuilt.

- **Questions:** onesource@uga.edu - ATTN: Reporting

Data Warehouse
Upcoming Budget/Project Cube Changes

- Alternative reports to use during the transition:
  - The EDR deadline is Mon, July 13:
    - Position Funding Cube
    - Queries within OneUSG Connect.
    - Simpler Data Apps
  - The GL Journal deadline is 12:00 p.m. on Mon, July 13:
    - Queries within UGA Financial Management
    - Simpler Data Apps

Data Warehouse
Upcoming Budget/Project Cube Changes

- Transition Tips:
  - For Companion Reports: Transition information for views and subscriptions will be announced soon!
  - For Cubes: Start taking screenshots of your current cubes. This information will help you to set up your new cubes.
    - Include your PivotTable fields so you know which fields you included.
    - If you can, include your cube format as well which can help you remember filter settings.
      - Ex. Based on my PivotTable fields I know I used UGAACCTTREE as a field. However, I wouldn't know that I had hidden Level 01 of the account tree and set my Bud Ref to 2020 and department tree to 2020-2020.

Data Warehouse
Upcoming Budget/Project Cube Changes

- Thank you to the BSAG and FRAG members who completed the release date survey and/or volunteered to be testers!
- Information regarding the upcoming changes will continue to be shared weekly.

If you have discovered your own tips and tricks for transitioning and rebuilding cubes and want to share them, please email: onesource@uga.edu ATTN: Reporting.

Human Resources & Faculty Affairs
Furlough Language for Offer Letters

- While awaiting further clarification about the possibility of furloughs, HR and OFA are working together to address possible updates to offer letter templates as well as notifications for any new employment beginning after July 1, 2020 (FY 2021).

- Please use the current offer letter templates available at the following sites:
  - Faculty Offer Letters
  - Staff Offer Letter
  - Partial Year Employment Agreement

HR People Operations
Undergraduate Student Employment

Undergraduate Student Employment Reminders

- If you have an undergraduate student employee that intends on returning to work in the same position in the fall, you do not need to process a termination for the summer.

- If the student employee does not return in the fall and is no longer working, you can process a termination through Manager Self Service (MSS) at that time.

- Decision guide for student employees is available on the HR website.

HR People Operations
Employment Verifications Reminders

- The Work Number (TWN) processes employment and salary verifications for the University of Georgia.

- If you receive requests or forms, please refer them to the HR website for additional information.

- Please contact the Onboarding & Employment Services team with any questions via hrweb@uga.edu or by calling 706-542-2222.

Payroll
HR/Payroll deadline reminder

- Biweekly payroll deadline is 5 business days before payroll processing.
- Monthly payroll deadline is 4 business days before payroll processing.
- HR sending friendly reminders when transactions to update job data are submitted after the HR/Payroll deadline.

2020 UGA Practitioner Payroll Processing Schedule

Monthly On Cycle Payroll Schedule

Pay Period Begin Date	Pay Period End Date	HR/Payroll Deadline*	Paysheets created 9am (Validate Monthly Pay query)	Mgr Leave/Time Approval by 9am **	OneUSG Confirm Date	Pay Date	Pay Run Id
01/01/20	01/31/20	01/16/20	01/22/20	01/23/20	01/24/20	01/31/20	01M1
02/01/20	02/29/20	02/13/20	02/19/20	02/20/20	02/21/20	02/28/20	02M1
03/01/20	03/31/20	**03/13/20**	03/24/20	03/25/20	03/26/20	03/31/20	**03M1*****
04/01/20	04/30/20	04/17/20	04/23/20	04/24/20	04/27/20	04/30/20	04M1
05/01/20	05/31/20	05/15/20	05/21/20	05/22/20	05/26/20	05/29/20	05M1

Payroll
Summer Payroll Exception Form

- Link to form on Summer payroll procedures link on OFA website
- When to use:
  - Corrections to previous month's summer pay (Example – to increase amount of Maymester pay)
  - To submit payment for new faculty hires **(more detail on next slide)**
- When NOT to use:
  - Overpayments – Request via Overpayment Request
  - Changes to funding should be processed via Express Direct Retro process

- The OneUSG Connect navigation for submitting the Exception Form using the MSS Request:
  - Navigator > Manager Self Service > Forms > Manager Self Service Request

Payroll
Summer Pay – New Faculty hires

- New faculty hires for summer starting June 1 or later will need to utilize the Exception process.

  - If the individual does not show up when you search for them to submit a Manager Self Service Request, it is likely their effective date of hire is not yet effective.

    - As an example, if the hire date is June 5, you cannot submit an Exception form prior to that date.

- The recommended deadline for submitting Exceptions is the HR/Payroll deadline date.

Query
Updated Summer Pay Queries

- Revised Summer Pay Entered by EmplID.
  - For 18F faculty, evaluates each month against the calculated maximum amount;
  - For 18P faculty, evaluates each month against the OFA approved amount;
  - No longer able to enter criteria for Over Max.

	Year	ID	Name	Pay Group	Position	HR Dept ID	HR Dept Descr	FT Faculty Summer Monthly Max	Earn Code	May Total	June Total	July Total	May Max Comparison	June Max Comparison	July Max Comparison	Summer Pay page
1	2020	72	E	18P	073	H1000		7634.07	SUM	4580.39	4580.39	0.00	Over Max	Over Max	Ok	Summer Pay page
2	2020	77	R	18P	091	H1000		902.88	SUM	3000.00	1778.00	1778.00	Ok	Ok	Ok	Summer Pay page
3	2020	81	J	18P	010	H1000		0.00	SUM	4000.00	0.00	0.00	Not Approved	Not Approved	Not Approved	Summer Pay page

Query
Updated Summer Pay Queries

- New query: 18P Faculty Approved for Summer
  - Provides the specific monthly maximums approved by OFA;
  - The query is limited to 18P academic schedule faculty within your security view;
  - If an individual does not show up on the list, please reach out to OFA at facultyaffairs@uga.edu with any questions.

	Short Desc	Dept ID	Descr	Name	EmplID	Empl Record	Job Code	Position	Job Title	UGA Faculty Rank	Faculty Fiscal/Acad Schedule	HR Status	Pay Status	Reg/Temp	Full/Part	Pay Group	Pay Group Descr	Stnd Hrs/Wk	FTE	Rehired Retiree	May Approved Amount	June Approved Amount	July Approved Amount
1	FACS	H1000	FACS-	S	88	0	922X00	285	Part-Time Instructor	PT Instructor	Academic	Active	Active	Temporary	Part-Time	18P	Part Time Faculty	15.00	0.375000	No	3310	3310	2500
2	FACS	H1000	FACS-	A	03	0	203X00	024	Part-Time Instructor	PT Instructor	Academic	Active	Active	Regular	Part-Time	18P	Part Time Faculty	10.00	0.208333	No	0	2500	2500

Query
Updated Summer Pay Queries

- New query: 18P Faculty Approved for Summer
  - The link to this query will replace the link to the Faculty Offer Letters at the end of the 1st row of the Summer Pay Queries.

	Set ID	Description	1	1-Description	2	2-Description	3	3-Description	4	4-Description
1	18000	UGA	Summer Pay Contact List	Contact list for those with the role that allows entering summer pay. Use this to help determine a contact for summer pay entries when the faculty is not in your HR Department and you do not have the ability to enter a summer pay amount.	Summer Pay Max Calc Query	Run to return job data with maximum Summer Pay amounts calculated based on the job compensation rate. The query will calculate the 33 1/3% maximum summer amount as well as the 11.11% maximum monthly amount. Use this query to prepare for entering data on the online Summer Pay page. The OFA Approved For Summer column will indicate if OFA has received and approved a PT/LT letter of agreement for 18P summer faculty.	Faculty Position Info Query	Run this query to return job data for faculty in 18F or 18P pay groups. Use this data to get information about faculty that are not within your department but will work in your unit this summer. You can then contact the home department to request they enter the Summer Pay data on your behalf.	18P Faculty Approved for Summer	List of 18P Academic Schedule PT/LT Faculty that have been approved for Summer 2020. This list includes the amounts approved for May, June, and July based on an OFA approved Letter of Agreement on file. If an individual does not show up on the list, OFA has not received and approved a Letter of Agreement.
2	18000	UGA	Summer Pay Entered By Month	Run this query to return Summer Pay amounts that have already been entered using the online Summer Pay page. Use the Job As Of Effective Date to pull the correct Spring compensation rate data.	Summer Pay Entered by Combo Code	Run this query to see Summer Pay amounts by Combo Code. This will provide the total Summer Pay entered to date. There are optional prompts for Combo Code, Combo Code Description, and Finance Department to limit the results.	Summer Pay Entered by EmplID	Run this query to review the total amount entered for an EmplID. This query also will evaluate if the monthly amount entered is over the 11.11% monthly maximum. If the monthly amount entered is over the maximum, update the amount on the Summer Pay page to be within the maximum amount allowed.	Additional Pay	Query to return Additional Pay amounts by Pay Period End Date. Use this query to verify the amounts entered in the Summer Pay pages have correctly been added to Additional Pay by the nightly process. You can limit the query results to just SUM earnings code. As an example, if you wanted to see only summer additional pay amounts for May 2020, use Earnings Code: SUM and Pay Period End Date: 5/31/20.
3	18000	UGA	Summer Pay Training	Training Resources for the Summer Pay process	Summer Payroll Procedures	Instructions posted on the OFA website for the Summer Pay process. The instructions provide details about the standard Summer Payroll Procedures and the Exception Process when entering data online via the Summer Pay page is not available.	Exception Form	Exception Form on the OFA website. This form is used to submit summer pay amounts when the standard procedure for Summer Pay cannot be used. Instructions are provided on this form as well as in the Summer Payroll Procedures document.	SWB/RWB Request	Link to the Short Work Break/Return from Work Break request on the HR website. This request is used to place someone on Short Work Break (SWB) which changes their payroll status to unpaid OR Return from Work Break (RWB) which changes their payroll status back to active.

Manage Faculty Events
Contract Delivery

- As a reminder, Fiscal Year 2021 and Academic Year 2020-2021 contracts for all full-time, regular faculty will be available electronically through the Faculty Data Self Service (FDSS) module of OneUSG Connect.

- Faculty will be notified via ArchNews when contracts are ready for signature.

- To ensure that faculty are prepared to access their contracts when they are available, the Office of Faculty Affairs and UGA's OneSource Project have developed:

  - A Quick Reference Guide; and

  - An online tutorial for viewing and signing your contract.

- Links to resources are posted on the Office of Faculty Affairs' Contract website.

- Questions on the contract system may be directed to Angelina Carlson (Angelina.Carlson@uga.edu) or Truitt Broome (truittb@uga.edu) in the Office of Faculty Affairs.

IDM
Upgrade Scheduled for June 5-7

Reminder

- Our current IDM system, OneIdentity, is on limited support and in need of an upgrade before the end of the year.

- With this upgrade, there will be look and feel changes for users of the IDM Portal.

- During this upgrade, there will be no impact for users to be able to use their MyID to get into campus systems.

- Identity creation and updates will be suspended during the upgrade weekend.

Web Browser
Clear Your Cache

Reminder

- If you're ever experiencing issues loading a web application or updating a website, it's a good practice to clear the cache in your web browser!

- This will ensure you're viewing the most current version of the website you're visiting!

Thursday Tidbit
Employee Assistance Program

Questions/Suggestions/Concerns

Contact Us

onesource.uga.edu

onesource@uga.edu

or

oneusgsupport@uga.edu