Agenda/June 13, 2019

• No Weekly Status Call –
  • June 27th and July 4th
• Simpler Reporting
  • New Data Apps for Finance
  • June/July Webinars
• Quick Reference Materials
• OneSource Thank You Event
• Budget FY20 Load
• Year-End Budget Review – Useful Reports
• Travel & Expense – Friendly Reminders
• Accounts Payable – Friendly Reminders
• Purchasing/UGAmart Documents Visible

• Known Issue – Grants Management
• Known Issue – Manager Self-Service
• Termination Requests
• FY20 Staff Salary – Compression & Inversion
• Dependent Audit – Benefits
• Outside Professional Activity (OPA)
• Biweekly Time & Absence Approval Deadline
• Listserv Transition
• OneUSG Connect Budget Load This Weekend
• System Manager Update – June/July Webinars
• Mainframe Access Removed June 30th
• Employee.uga.edu Unavailable After June 30th
June 13, 2019

Session Highlights/Updates
Weekly Status Call
Two Week Break!

• There will not be a Weekly Status Call session on:
  • Thursday, June 27, 2019
  • Thursday, July 4, 2019
• This includes both the general session from 1:30 p.m. to 2:30 p.m. and the Project Coordinator session usually scheduled to meet from 2:30 p.m. to 3:00 p.m.
• We will resume calls on Thursday, July 11, 2019
OneSource Thank You Event
Please RSVP!

Join us on Thursday, June 27, 2019, 2 – 4 p.m. (remarks by leadership begin at 2:30 p.m.)

Tours of the athletic facility will be provided during the event.

*Parking is limited at the Tate Student Center Deck due to Orientation. We are asking that you please carpool, if possible.
Simpler Reporting
New Data Apps for Finance

• Simpler data apps for use with the UGA Financial Management System are now available. As a reminder, you must be logged into VPN02 in order to access Simpler.

• You may access it using the same log in as you currently do for legacy Simpler data reporting at simpler.uga.edu. Once you have logged in, select “PeopleSoft Financials” in the bottom right to access the new Financial Management System data in Simpler.

• Coming soon! The homepage for Simpler will be “flipped” to reflect the new data apps first. There will be a link to allow you access to legacy data under Legacy Reports.
Simpler Reporting
June/July 2019 Webinars

• Please register for one of the *Simpler* webinars:
  • Wednesday, June 19, 2019 at 8:30 a.m. [Click here to register](#)
  • Wednesday, July 17, 2019 at 10:00 a.m. [Click here to register](#)

• Registration information can be found on the OneSource Training Resources page.
• After registering, you will receive a confirmation email containing information about joining the webinar.
Did you know that you can find Quick Reference Guides, Job Aids, Tool Kits and other helpful materials in the OneSource training library?

There are materials specifically for employees, faculty and practitioners.

Select one of the links below to begin searching and don’t forget to pass along to your colleagues.

- Quick Reference Materials for Employees
- Quick Reference Materials for Faculty
- Quick Reference Materials for Practitioners
System Manager Update
June/July 2019 Webinars

• This course is an update to the original MSS for System Managers course, providing additional information on best practices for MSS transactions, new information on ad hoc salary change and supplemental pay, summer pay, and more.
• Please register for one of the System Manager Update webinars:
  • Thursday, June 27, 2019 at 8:30 a.m. [Click here to register]
  • Thursday, July 18, 2019 at 8:30 a.m. [Click here to register]
• Registration information can be found on the OneSource Training Resources page.
• After registering, you will receive a confirmation email containing information about joining the webinar.
June 13, 2019

UGA Financial Management System Module Awareness
Useful Reports for Year-End Budget Review

- Available in the Training Library
- Presentation Slides
- Recorded Version
- Quick Guide
- Tutorials

### Year-End Budget Review Quick Reference Guide

The following reports and queries may be useful during the year-end budget review process. The table indicates the name, description, and location where the information can be accessed. Please be aware that access to different systems may vary depending on your security role.

<table>
<thead>
<tr>
<th>Useful Year End Reports</th>
<th>NAME</th>
<th>DESCRIPTION</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Tree</td>
<td>View tree hierarchy of all departments, including whether it is central, transaction, or control transaction</td>
<td>UGA Budget Management</td>
<td></td>
</tr>
<tr>
<td>Quarterly Amendment Review</td>
<td>Report to ensure there are no overdrawn fund codes by intermediate unit for each fund code. Broken out by Revenue, Personal Expense, and NonPersonal Expense budget.</td>
<td>UGA Budget Management</td>
<td></td>
</tr>
<tr>
<td>Budgetary Detail Report (Benefits Included)</td>
<td>Shows budget and balances by account type. Original and current budget, encumbered balances, and available balances. Excludes benefits account codes.</td>
<td>UGA Budget Management</td>
<td></td>
</tr>
<tr>
<td>YTD Expenses Budget vs. Actuals</td>
<td>Report with department fund balances (budget and encumbered actuals). Red indicates the presence of funds.</td>
<td>UGA Budget Management</td>
<td></td>
</tr>
<tr>
<td>Budget Status Report v2.0 (Tableau)</td>
<td>The BSR v2.0 provides budget-to-actual information at the summary or detail level for projects. This report will download as a pdf file and has subscription capabilities which will deliver a customized report to your email on a set schedule. Closely resembles the legacy Account Status Report.</td>
<td>UGA Data Warehouse</td>
<td></td>
</tr>
<tr>
<td>Project Status Report</td>
<td>This cube can be used to view budget-to-actual information at the summary or detail level for projects. This cube will download as an Excel spreadsheet and utilizes “PivotTable” functionality.</td>
<td>UGA Data Warehouse</td>
<td></td>
</tr>
<tr>
<td>Budget Status Report Cube</td>
<td>Provides transaction and budget detail. Allows customization of the data to suit the needs of individual units.</td>
<td>UGA Data Warehouse</td>
<td></td>
</tr>
<tr>
<td>Project Status Cube</td>
<td>Provides transaction and budget detail for projects. Allows customization of the data to suit the needs of individual units.</td>
<td>UGA Data Warehouse</td>
<td></td>
</tr>
<tr>
<td>Position Funding Cube</td>
<td>The Position Funding Cube provides payroll detail information and encumbrance amounts by charting by employee. The report can be used as a personal services detail or payroll cost report.</td>
<td>UGA Data Warehouse</td>
<td></td>
</tr>
</tbody>
</table>
Budget FY20 Load Awareness

Financials:
• FY20 Fiscal Budgets loaded into Financials by Friday, June 28, 2019
• Transactions against FY20 funds should be entered on or after July 1, 2019
• Budget Journals and Transfers, Payment Requests, etc.
• Revising Year End Letter for Procurement considerations
“Submitting FY20 Funded Purchase Requests Before July 1, 2019”: Exceptions

1. **Sponsored Projects** (specifically fund 2XXXX) may continue to process purchase requisitions using Budget Reference 2019. Please limit to critical or emergency purchases until July 1st (FY20). Central Research Stores will not be impacted by the delay in the FY20 budget load.

2. Departments having an **emergency/critical need where sufficient FY19 funds do not exist and where an order must be placed PRIOR to July 1, 2019** should contact the Procurement Office at 706-542-2361 and speak with one of the following individuals: Annette Evans, Jessica Beri, or Claire Boyd.

3. **Purchase Requests using FY20 funds that need to be released July 1 AND where it is necessary for Procurement to take action (i.e. review sole source justifications, terms, solicit bids) prior to the FY20 budget being loaded**, follow the steps at this location:

   • **For FY20 requisitions that have already been submitted to the Procurement Office**, Procurement will reach out to determine whether an emergency/critical need. For non-emergency purchases, Procurement will return the requisition to the requisitioner as a draft cart that can be revised and re-submitted once the FY20 budget has been loaded.
Travel & Expenses
Friendly Reminders

• **Travel Authorizations (TA)**
  - FY20 Travel Authorizations creation can occur once the FY20 budget is loaded
  - FY20 travel authorizations must reflect a 2020 budget reference.

• **Expense Reports**
  - FY19 expense reports are due in Accounts Payable by noon on Thursday, June 27, 2019.
  - Please delete any pending FY19 expense reports that you will not complete this fiscal year to ensure we do not have lingering accounting transactions in the system as we complete the year-end accrual process.
  - FY20 expense report creation can begin June 27, 2019
    - Accounts Payable will change the creation date of your FY2020 expense reports to July 1, 2019.
    - FY2020 expense reports must reflect a 2020 budget reference.
Accounts Payable
Friendly Reminders

• Payment Request
  • FY19 payment requests are due in Accounts Payable by noon on Thursday, June 27, 2019.
  • FY20 payment request creation can begin July 1, 2019 and need to reflect a FY20 accounting period.

• AP Journal Vouchers
  • FY19 AP journal vouchers are due in Accounts Payable by noon on Friday, June 28, 2019
Purchasing

UGAmart Documents Visible

• Change made at the end of May from a BSAG request

• UGAmart visibility permissions have been updated to allow all UGAmart shoppers to view all documents in UGAmart.

• UGAmart Access Requests are no longer needed to view documents in UGAmart.
Known Issue: Grants/Projects Reporting (PO Encumbrance Discrepancies)

- Roughly 625 projects have discrepancies in encumbrance amounts for reporting tools that use the Project tables (such as Project Status Report) and the KK tables (such as Budgets Overview).
- A known issue was posted on 6/7/19 and a list of projects can be found here.
- This is a result of the fact that PO liquidation occurs differently between these two tables (quantity versus amount).
- If you have one of these projects, the encumbrance balance in the KK tables (e.g. Budgets Overview) is accurate.
- An initiative is underway to determine the most expedient path to resolution.
June 13, 2019

OneUSG Connect
Module Awareness
OneUSG/HR Open Office Hours

- Open Office Hours will be held in June from 3:00 p.m. – 5:00 p.m. in Caldwell Hall, room 410 on the dates listed below:
  - Thursday, June 13th
  - Thursday, June 20th
    - Call-in number is available: 877-336-1829 /Access code: 7969992

- No open office hours on June 27th or July 4th
OneUSG Connect
Manager Self-Service: Known Issue

- Level 5 approvers for the Manager Self-Service transaction that will be used to submit summer pay change forms is *not routing correctly* and is being sent to OneUSG Connect Support instead.
- MSS/ESS Lead is monitoring these requests and will reroute to UGA Payroll.

<table>
<thead>
<tr>
<th>Known Issue Title</th>
<th>Posted Date</th>
<th>Status</th>
<th>Audience</th>
<th>Overview</th>
<th>Functional Workaround</th>
<th>Resolution Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self-Service Transactions Routing to Shared Services Center and not to UGA Payroll</td>
<td>06/11/2019</td>
<td>Known Issue: Manager Self-Service</td>
<td>Level 5 Approvers within Manager Self-Service</td>
<td>The Manager Self-Service (MSS) transactions used to submit Summer Pay Change forms is not routing correctly and are going to OneUSG Connect Shared Services Center (SSC).</td>
<td>The MSS Lead will monitor these requests and the SSC will re-route to UGA Payroll.</td>
<td></td>
</tr>
</tbody>
</table>
OneUSG Connect
Manager Self-Service

• Review Transaction Tile Missing from Manager Self-Service
  • Use NavBar-Navigation-Self Service-Review Transactions
• Supplemental Pay MSS Transaction is live
  • Ad Hoc Salary Change reason codes have been reduced to reasons associate with changes to base compensation. Supplemental Pay request will need to use the Request Supplemental Pay transaction.
• A new tutorial is available in the Training Library with more information: Requesting Supplemental Pay
Workforce Administration
Termination Requests

- Updates to this MSS form include an automatic update to the employee's record based on the effective date provided. If there are any discrepancies, the WFA team is not able to override the departmental requests. These transactions will be returned to the department to resubmit with the correct effective date.

- When processing termination of employee requests, please include the following information in the comments section:
  - Department/Position Information
  - Last day worked
  - If the person is on leave with applicable dates
  - If you are aware of a transfer

- Once validated, the WFA team will approve the transaction and validate the updated job data rows have been populated

- In addition to the Termination Request Form, this automatic update is in effect for Retirements and Ad Hoc Requests.
Benefits

USG System-wide Dependent Audit

• University System of Georgia (USG) will be conducting a system-wide dependent audit of the medical, dental and vision plans this year.
  • The dates of the verification period: **July 22, 2019 – September 06, 2019**
  • Any employee that *added* dependents to either medical, dental or vision plans **prior to 7/1/2017** will be required to re-verify their dependent status.
  • All active employees, employees in a leave status, retirees and COBRA participants are included in this audit.
• More details to come...
As a result of the Cohort 5 (Augusta University) implementation of OneUSG Connect, an additional option for Outside Professional Activity (OPA) will appear under Absence Requests.

At this time, UGA is not using OneUSG Connect to track OPA.

If a UGA employee chooses this by mistake, the supervisor should deny that request.

The current processes for obtaining and tracking OPA approvals are still in place.

Absence Management
Biweekly Time & Absence Approval Deadline

Starting July 15, 2019:

• The absence calendar will close at 10am.
• This aligns with the biweekly time approval deadline.
• Campus will gain an additional hour to enter and approve their absence requests.

Starting 7/15: Approvals due 10:00 a.m.
Time & Labor
Listserv Transition

- The MyTime Listserv will be transitioning to the Time and Absence Listserv.
  - Everyone who is currently subscribed to the MyTime Listserv will be copied over to the new listserv.
  - Everyone who is currently subscribed to the Project Coordinator Listserv will also be copied over to the new listserv.
- The new Time and Absence Listserv will be a "subscribe yourself" listserv, where you can subscribe or unsubscribe yourself as needed.
- The Time and Absence Listserv will be used next week for the first time.
  - Click to subscribe: TIMEABSENCE-L
  - Click to Unsubscribe: TIMEABSENCE-L-signoff-request@LISTSERV.UGA.EDU
Summer Payroll
Notes for July Spreadsheets

• Common errors to avoid
  • Missing Empl ID and Empl Rec.
    ➢ Information should not be entered manually
    ➢ Copy information from 180_HRJOB_SUMMER_PAY_CALC query
  • Missing 81#s and/or hours for Grad Assistants
• Summer School query reporting $0
  • Will have corrected query for July summer pay spreadsheets
  • Use a saved June Summer Pay Calc query or email payroll@uga.edu to request a copy of the Summer Pay Calc query run on 6/11/19.
OneUSG Connect Budget Load
This Weekend

- Central HR and Budget Staff will be focused on the budget load on Friday, June 14th
- Pause in place on updates to current employees
- No effect on new hires
- Target for FY20 positions loaded into OneUSG Connect by Monday, June 17th
June 6, 2019

Updates/Reminders
Mainframe Access Removed  
June 30, 2019

• **Reminder:** This is the last year mainframe systems will be included in the FY19 System Verification process.
  
  • **Access to the mainframe will be removed June 30, 2019.**

• QMF
• WebDFS
• IMS/TSO/(Green Screens)
• [https://onesource.uga.edu/resources/system_changes/](https://onesource.uga.edu/resources/system_changes/)
employee.uga.edu
Unavailable after June 30, 2019

• Download pre-2019 paystubs and W2s by June 30, 2019
• Paystubs and W2s prior to January 1, 2019 will NOT be migrated to the new University System of Georgia employee site, OneUSG Connect.

• If you wish to keep copies of pre-2019 paystubs or W2s for your records, please take action to download them from employee.uga.edu before June 30, 2019.
• Log into employee.uga.edu and click on “My Paychecks” and/or “My W2s” in the left sidebar. Both paychecks and W2s are available in PDF format and can be printed. Please store these in a secure personal location as they will contain your SSN.
  • Please contact the EITS Help Desk at 706-542-3106 or helpdesk@uga.edu for assistance with this process.

• After June 30, 2019, to request copies of pre-2019 paystubs or W2s, please contact oneusgsupport@uga.edu or 706-542-0202 (option 1). These records are retained for 5 years from their issue date.
• All employees will access paystubs and W2s dated after January 1, 2019 on OneUSG Connect.
Questions/Suggestions/Concerns

Project Feedback
onesource.uga.edu
onesource@uga.edu
oneusgsupport@uga.edu