Weekly Status Call

July 2, 2020
Weekly Status Call
Transition to Zoom Webinar

• Thank you for your patience!

• If you have any suggestions, please submit those via the question panel.

• [Getting Started guide](#) available from Zoom for participants.
Weekly Status Call
Transition to Zoom Webinar

• **Webinar Controls:**
  • **Audio Settings** (only visible if the host hasn't granted you permission to talk): Change your audio settings. You can also click the upward arrow (^) next to change your speaker.
  • **Unmute/Mute**: If the host gives you permission, you can unmute and talk during the webinar. All participants will be able to hear you. If the host allows you to talk, you will receive a notification.
  • Note: You can still access the audio settings by click on the ^ arrow next to the Unmute/Mute button.
  • **Chat**: Open in-meeting chat, allowing you to send chat messages to and send a message to the host, panelists, and attendees (if permitted).
  • **Raise Hand**: Raise your hand in the webinar to indicate that you need something from the hosts or panelists.
Weekly Status Call
Transition to Zoom Webinar

- **Webinar Controls:**
  - **Question & Answer:** Open the Q&A window, allowing you to ask questions to the host and panelists. They can either reply to you via text in the Q&A window or answer your question live.

- **To ask a question:**
  1. Type your question into the Q&A box. Click **Send**.
  2. If the host replies via the Q&A, you will see a reply in the Q&A window.
## Training Courses

**Reminder**

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<td>Understanding Accounts Receivable, Deferred Revenue and Carry Forward Calculation</td>
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Fiscal Master Calendar
Upcoming Downtimes/Updates

Access the Fiscal Master Calendar for additional dates and information!
July 2, 2020

Financials,
Budgets,
Reporting
Purchasing COVID Signage

• As mentioned in the Supervisor Return to Campus training, sign templates for social distancing, sanitizing, and other preventative measures are available through the Marketing and Communications website. Units will be responsible for printing and posting signs as needed.

• Units can work with Bulldog Print + Design if they have a need for printing. There is a "Contact Us" tile on this website if you have printing questions.

• Units should follow their normal ordering process when using Bulldog Print + Design including payment and allowing for lead time. Use the job request form to submit details to the team for a quote.
Purchasing

Amazon Business Reminders

• **Product Returns**
  • Returns can only be initiated and handled by the punchout user; the individual who accessed the punchout and added items to the cart.
  • Amazon currently limits product returns to refunds only.

• **Business/Personal Accounts**
  • If using a personal Amazon account and UGA Business Account on the same computer (punchout or Pcard), be mindful of which account you are logged in to at a given time.

• Instructions for Amazon Business returns and more information on using Amazon for Business are in the OneSource Training Library, Amazon FAQs.
A special THANK YOU for all the hard work and creativity put towards completing the annual inventory during FY20!

The effort the Asset Management office has seen from faculty & staff to account for inventory was very encouraging and shows that UGA strives to be good stewards of our resources even in these unique circumstances.
Bursar and Treasury Services
Deposit Reminder

• **FY21** deposits will not be reflected on departmental accounts in reports or queries until FY20 is officially closed by Accounting.

• Please continue to submit deposits via TouchNet as required.

• Deposits are still being processed and sent to Accounting as scheduled.

• Please reach out to bursar@uga.edu if you have any questions or concerns.
Creating a "New" Journal

- Journals for FY20 will need to be at the Accounting level by end of day, July 13.
  - July 1 – July 13 Journals will need to be "backdated" to June 30.
  - Year End Journal Entry Preparation

Backdating of journals is ONLY acceptable during the year end adjusting period!
Creating a "Copy" from a previous journal

- If you copy a journal, you should ALWAYS check the "Recalculate Budget Date" in the Journal Entry Copy options box:
Accounting

Adjusting Period/Year-End Closing

• **Journal Reminders**
  - Use BudRef "2020" on Adjusting/Closing Journals
  - FY21 will not be open to accept GL Journals until July 14. PLEASE HOLD FY21 Journals until after this date.
  - AP and Travel and Expense Modules are CLOSED to FY20 activity. Any adjustments to activity processed by these modules will need to be adjusted with a GL Journal between the dates of June 27 and July 13. (For BudRefs <= 2020)
  - Grants activity should be reviewed before year end to determine if adjustments are needed to FY20 activity charged to grants.
  - A/R Requests have been recorded. Please ensure that you create a detail deposit code for Account 127162 (DSS AR) as explained in the AR training. All collections of A/R invoices should be deposited to the "AR" Detail Deposit Code that you set up.
  - Deferred Revenue – Initial calculation has posted. Additional analysis and adjustments will be processed thru July 14th to ensure that chartstrings don't fall into deficit balances. Accounting is responsible for these adjusting entries.
Accounting

Adjusting Period/Year-End Closing

• Anomaly Reminders
  • Anomaly report being run as of June 30, 2020 and will be sent to department June 2, 2020.
    • Notify Accounting concerning combo error corrections by **July 8, 2020**. Accounting is making entry for these.
    • Other adjustments that department will be making by GL Journals need to be completed by **July 10, 2020**.
  • Check the list for items that you have already analyzed. If you have already identified that a specific anomaly is OK, you do not need to do anything else with that item.
  • Look for "new" items that have not yet been researched.
    • Not all Anomalies need adjusting!
      • Revenue deposited FY19 – Refund issued FY20 Will create a debit balance in Revenue – This is OK
      • Expense paid in FY19 – Vendor refund received in FY20 will create a credit balance in Expense – This is OK
      • Anomalies are used as a tool to identify "**miscoded**" items (mismatched or erroneous chartstrings used when transactions were first processed).
• **P-Card Reminder**
  
  • Please address budget exception errors!
  • Accounting has sent notifications for P-Card errors and queries are available to identify.
Budget Management

BPSS Load (Budget)

- 8% / 10% reductions updated to 7% / 9%
  - Adjustments were done by UBO and were placed in a Casual Labor Account 525000 for each unit's OB chartstring

- UGA Financial Management has been updated

- Commitment Management is accepting Budget Journals for FY21

- Other FMS transactions will be available in the coming days (e.g. GL Journals)
Budget Management

BPSS Load (Position)

• Planning to load to OneUSG Connect on July 3
  • Compensation and Job data
  • Position Funding

• Certain processes will be paused today to accommodate the load

• We ask you review your employee's compensation rates to ensure quick resolution of any variances

• Position Funding changes can be processed beginning July 10
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](mailto:onesource@uga.edu) - ATTN: Reporting
Data Warehouse

Upcoming Budget/Project Cube Changes

• Cube Transition Tips:
  • 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 are included.
    • If you can, include your cube format as well which can help you remember filter settings.
  • Ex. Based on the PivotTable fields you can see UGAACCTTREE is selected as a row. However, you wouldn't see that Level 01 of the account tree was hidden or that Bud Ref and UGADEPTBUDGRPT were filtered to specific values.
• Companion Report (Tableau) Transition Tips:
  • Subscriptions versus views:
    • A subscription is a view that has been saved and set up to be emailed to your or someone else on a recurring basis.
    • A view is a saved version of a report – does not necessarily have a corresponding subscription.
  • Important: All views that are not associated with a subscription will need to be rebuilt by their owners.
  • Subscription rebuilds are underway by OneSource students.
• **Beginning July 10, the paginated BSR will no longer be available.**
  - Due to the data source change taking place on July 10th, the underlying data for this report will be fundamentally different and it will not be possible to rebuild the report in the same way.

• **Alternative Reports:**
  - **Monthly Status Report**
    - Similar structure to the BSR v1.0. Two tabs: Summary and Detail
    - Can be run for multiple departments at once.
    - Provides a carryforward balance, current month transactions, ending balance
  - **Budget Status Report (v2.0/v3.0)**
    - Summary and detail tabs with transaction and payroll drill-through detail.
    - More customizable.
    - Can be run for multiple departments at once.
    - Can be set up to email out on a recurring basis.
Data Warehouse
Upcoming Budget/Project Cube Changes

Upcoming Training Webinars:

What's New in the Data Warehouse - Budget Reporting
Tuesday, July 14 10:00 a.m. – 12:00 p.m.
Registration Link

What's New in the Data Warehouse - Project Reporting
Thursday, July 16 10:00 a.m. – 12:00 p.m.
Registration Link

In addition, all Training Library materials associated with the current Budget and Project Status cubes and their corresponding companion reports is in the process of being updated.
A **BIG** thank you to everyone who participated in Cube and Tableau Testing!!

We could not have done this without you!
July 2, 2020

OneUSG Connect,
Human Resources,
Payroll
Commitment Accounting

FY21 Change Position Funding Transactions

- Email sent this morning to users who have recently submitted a change position funding request.

- Due to the timing of the FY21 budget load, MSS Change Position Funding requests are **not yet available** for processing in OneUSG Connect. However, the system is still allowing these to be processed even though the FY21 budget is not yet loaded.

- Since FY21 funding information is not yet available in OneUSG Connect, please do not submit any change position funding transactions until you receive further communication.

- Any FY21 funding transactions that have already been submitted will be deleted and will need to be resubmitted once the FY21 budget has been loaded into OneUSG Connect.

- Please contact OneUSGSupport@uga.edu with questions.
Commitment Accounting
OneUSG Connect 6.11 Release

• OneUSG Connect is planning to deliver the 6.11 release the evening of Thursday, July 9.

• This release is the Change Position Funding enhancement that allows multiple effective dated position funding changes in a single transaction.
Commitment Accounting
FY21 Position Funding Reminders

• Budget Planning and Salary Setting (BPSS) does not have the ability to re-direct fringe benefits when funding a position.

• Fringe re-directs for FY21 must be entered via Manager Self Service Change Position Funding.

• As was communicated in past weekly status calls, positions funded (partially or completely) by a grant that has an end date of July 1 or earlier will not have funding loaded for FY21.

• FY21 funding for these positions will need to be entered via Manager Self Service Change Position Funding.
Benefits

Transfers To/From UGA

- **Notify Benefits** when a staff or faculty member is transferring from UGA to another USG school or is transferring from another USG school to UGA as soon as possible and before submitting the hire request in MSS.
  - This will help HR coordinate the **continuation of the employee/faculty member’s benefits** and will prevent the unintended termination of benefits or a gap in coverage.

- Please remember that the hire date of a transfer from another UGA school who terminates from the other school on July 31, needs to be Saturday, August 1 in order for the employee’s benefits to be active on August 1 and 2.

- You may inform HR/Benefits of transfers by emailing [hrweb@uga.edu](mailto:hrweb@uga.edu).
  - Provide the name of the employee/faculty member and the name of the USG school he/she is coming from or going to as well as the effective date of the hire at UGA or termination from UGA.
Campus Reopening
Required Training

• **Supervisor training**
  • Progress reports distributed to designated unit HR Liaison:
    • Sent early last week (June 23 and 24)
    • Set to be sent after June 30

• **Employee training** module is tentatively set for release around July 8.
Before the OneUSG contract system creates the contracts, all hiring units will have an opportunity to review their regular, full-time faculty’s contract data.

- These data will become available for unit review via the “Faculty Contract Dept Review” query in OneUSG on **Monday July 6, 2020**. Detailed instructions will be distributed on Monday morning.
- Your unit’s review should be completed and all error reports submitted to OFA by **5 pm on Thursday July 9, 2020**.

Links to faculty and appointment unit support materials are posted on the Office of Faculty Affairs’ [Contract website](#).

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

Questions on the contract system may be directed to Angelina Carlson ([Angelina.Carlson@uga.edu](mailto:Angelina.Carlson@uga.edu)) and Truitt Broome ([truiitb@uga.edu](mailto:truiitb@uga.edu)) in the Office of Faculty Affairs.
Manage Faculty Events
Faculty Hiring Proposals

• There are several hiring proposals currently in various workflow states in UGAJobs headed to OFA for review. Please be sure to check on any HPs with an August 1 start date to make sure they are not stalled in the workflow.

• You can see the current workflow state by checking the history tab in UGAJobs.

• If you are aware of faculty hires, and a hiring proposal has not yet been started, please have these submitted as soon as possible with August 1 rapidly approaching.

• OFA has received and processed numerous hiring proposals in UGAJobs for faculty beginning employment on August 1 already. Thank you for getting so many through the hiring process already!
• A couple of reminders:

• Per a memo related to faculty hires sent March 30 and posted on OFA's website, a hiring proposal for a faculty appointment must be fully approved in UGAJobs before the effective start date for the appointment (i.e. the hiring proposal must be at all approvals).
  • “In order to maintain compliance with federal and state law, as well as USG and UGA policy, retroactive start dates are not acceptable in any faculty hiring proposals.”

• Per policy 1.09-13 Public Announcement of New Faculty Appointments and Titles, the appointment may not be publicized before the background investigation is completed by Human Resources.
Time & Labor

Teleworking Reporting

• As employees are returning to campus, they will begin reporting time as regular again.
• Any time that is worked remotely should continue to be reported as Teleworking (00TWH).
• Any time that is worked on campus should be reported as Regular (00REG).
• If the day is worked partially at home and partially on campus, that should be reflected on the timesheet.
  • Example: The employee may report 4 hours of TWH and 4 hours of REG on the same day if they worked half the day from home and half the day in the office
• This is for biweekly employees only – we have not asked monthly employee to use the Teleworking Code.
OneUSG Connect / OneSource/ University HR
Service Desk Reminder

• Service Desks at OneUSG Connect Support, the OneSource Service Desk and University HR will be closed Friday, July 3 in observance of the Independence Day holiday.
Thursday Tidbit

What do UGA and July 4th have in common?

• The Fourth of July—also known as Independence Day or July 4th—has been a federal holiday in the United States since 1941, but the tradition of Independence Day celebrations goes back to the 18th century and the American Revolution. On July 2nd, 1776, the Continental Congress voted in favor of independence, and two days later delegates from the 13 colonies adopted the Declaration of Independence, a historic document drafted by Thomas Jefferson.

• From 1776 to the present day, July 4th has been celebrated as the birth of American independence, with festivities ranging from fireworks, parades and concerts to more casual family gatherings and barbecues – history.com
Thursday Tidbit
What do UGA and July 4th have in common?

• The University of Georgia (UGA) is the oldest, largest, and most comprehensive educational institution in Georgia. Chartered by the Georgia General Assembly in 1785, UGA was the first university in America to be created by a state government, and the principles undergirding its charter helped lay the foundation for the American system of public higher education.

- georgiaencyclopedia.org
Thursday Tidbit
What do UGA and July 4th have in common?

• In 1785, **Abraham Baldwin**, a lawyer and minister educated at Yale University, who had settled in Georgia in 1783, wrote the charter that created the University of Georgia. Reflecting the exuberance of newfound freedom sweeping through the colonies, he created a populist document that departed sharply from conventional notions about higher education. The charter asserted that an educated citizenry is essential to a free government, that government has a responsibility to see that its citizens receive an education, and that all people—not just the wealthy and privileged—have a right to education.

• Abraham Baldwin was one of Georgia's two delegates to the 1776 Continental Congress.
INDEPENDENCE DAY

happy 4th of July
Questions/Suggestions/Concerns

Contact Us

onesource.uga.edu

onesource@uga.edu

or

oneusgsupport@uga.edu