Weekly Status Call

August 8, 2019

Agenda

- Reminder! Open Office Hours
- Reminder! Upcoming Training Courses
- InteractUSG Conference
- Published Time Entry Guide
- Service Desk & Ticketing "Help"

- UGA Financial Management Module Awareness
  - Fiscal Year End Status Update
  - Budget Management Updates
  - Financial Management Updates
  - Budget Status Report Version 2.1
  - Accounts Payable Supplier Names
  - Travel & Expense

- OneUSG Connect Module Awareness Year-end
  - Encumbrance Known Issue resolved
  - MSS/ESS: Business Phone Number
  - HR: Query Sneak Peak
  - New Employee Info
  - Graduate Assistantships

- BSAG Time

HR/Payroll
Open Office Hours

- The OneSource Team will continue to offer open office hours into fall for guidance on HR/OneUSG Connect.
- Team members will be available to cover questions regarding UGAJobs processes, changes for monthly staff compensation or percent time, funding changes, terminations and transfers, etc.
  - **No registration is required.**
  - **Each Thursday from 3:00 p.m. – 5:00 p.m.**
  - **4th floor of Caldwell Hall**
  - Call-in number: 877-336-1829 access code: 7969992

Training Courses

- ***UGAmart for Beginners training*** covers the requirements for financials month-end close and monthly payroll
  - Tuesday, August 20 & Thursday, September, 19: Register through T&D
- ***Simpler Training*** course provides an overview of the updated Simpler system, including new apps that can be used to filter, group, and summarize data from the UGA Financial Management System.
  - Wednesday, Aug 21, 2019 1:30 p.m. - 3:30 p.m. Click here to register.
- ***System Manager Update:*** another session of the System Manager Update webinar has been added due to popular demand!
  - Tuesday, September 10, 2019 8:30 a.m. – 11:00 a.m. Click here to register.
- ***Month End Close Procedures*** covers the requirements for financials month-end close and monthly payroll
  - Wednesday, September 11 1:30 p.m. – 3:30 p.m. Click here to register.

InteractUSG Conference

No Weekly Status Call on September 19th

- *Heads up*! There will be **no weekly status call on Thursday, September 19**.
- Allows for attendance of the InteractUSG Conference.
  - Nearly 150+ peer-led sessions
  - Featured speakers, hands-on training and roundtable discussions
  - Dedicated tracks focused on your area of IT, including: Academic Services, Administrative Services, Client Support, Infrastructure, Professional Development and more
  - Great networking opportunities
- If you're interested in this conference, follow the USG link for registration information and conference details.
  - Wednesday, September 18 – Friday, September 20
  - Savannah Convention Center; Savannah, GA

Bi-weekly Employee Time Entry Guide

Find these guides in the **Faculty Staff Guide** web pages

OneSource
UNIVERSITY OF GEORGIA

Time for Biweekly Staff

OneUSG Connect Time Entry Quick Start

ONESOURCE.UGA.EDU

One USG Connect Employee Self Service site will be your one-stop-shop for all your employee information. You can access OneUSG Connect on the OneSource homepage at onesource.uga.edu.

Employees who are paid biweekly will submit their time in **one of four** ways:

- Using Pay from Schedule to Submit Time
- Reporting Time Using A Web Clock
- Submitting a Punch Timesheet (Manual)
- Using a Kaba Clock

This guide contains instructions for submitting a punch timesheet, reporting time using a web clock, and submitting using pay from schedule.

Instructions for using the Kaba Clocks will be posted by each time clock.

Submitting Time Using Pay from Schedule

You will enter the total number of hours worked each day.

From **OneUSG Connect Employee Self Service**, click **Time and Absence**. Click **Weekly Timesheet**.

There should be an option to 'Apply Schedule'. Your time will automatically populate. You will be able to edit your time if necessary.

If you have paid holidays or absences on your timesheet, you will need to manually enter your time for each day. The 'Apply Schedule' option will not be available.

If a blank row is not showing, click the **Add (+)** icon at the beginning of the row. Otherwise, skip this step.

Click the **Time Reporting Code** drop-down and select the appropriate entry. This is usually **"ooREG – Regular"**.

If you need to enter different types of time entries for one day, add an additional row.

You cannot add any leave or absences directly to the timesheet.

Click **Submit**

Confirm you entered all absence requests for the pay period. If you haven't, enter your absence requests. If you have, click **OK**.

Report Time Using A Web Clock

From **OneUSG Connect Employee Self Service**, click **Time and Absences**.

On the **Time** page, click the **Web Clock** Link.

“My case is resolved” Understanding the Ticketing Systems

Understanding the ticketing systems

Resolved and Closed Cases

- **Tip #3: Although kind remarks and thank you messages are appreciated, please remember to NOT send these as a response to a completed case.**

- Once your case/ticket is resolved or closed, *please do not reply to say "thank you" or add a remark in a response if that's all you are providing*. For the OneSource Service Desk (onesource@uga.edu) ticketing system (TeamDynamix), this *causes the ticket to be REOPENED*. Central units must then spend time re-closing tickets when we could be answering your other questions.

- If you do have further questions about a resolved/closed ticket:
- For onesource@uga.edu tickets: You can reply to the email associated with that case and the ticket will be reopened appropriately. Please do not send a separate email as that opens a *new* ticket and the history is not included.
- For oneusgsupport@uga.edu tickets: There is a specific link in the top of the notification email that you need to click to re-open your ticket. Responding to that system via email does not reopen the case and your comments will not be seen. The resolved details are usually halfway down in that notification email.

Service Desks - Getting Help

Issue/Problem	Contact	Ticketing System
ArchPass Duo and VPN support MyID password resets	EITS HelpDesk 706-542-3106 helpdesk@uga.edu	EITS TeamDynamix
OneUSG Connect System	706-542-0202, option 1 oneusgsupport@uga.edu	USG Service Now
UGA Financial Management System UGA Budget Management System	706-542-0202, option 2 onesource@uga.edu	Finance TeamDynamix
UGAJobs	706-542-2222 hrweb@uga.edu	HR TeamDynamix

Understanding the ticketing systems

Two Ticketing Systems

TeamDynamix

- UGA standard
- "Units" on one system:
  - EITS
  - HR
  - Finance
- Units have "Teams":
  - Accounts Payable, Accounting, etc.
- Cases can be "reassigned" between Teams, or to other Units
- Case details can be "sent over" to Service Now"

Service Now

- USG Standard
- USG Systems on one system:
  - OneUSG Connect
  - Library support
  - Banner support
- Systems have "Teams", both USG and UGA Teams
- Cases can be "reassigned" between teams
- Case details can be "sent over" to TeamDynamix

Understanding the ticketing systems

Two Ticketing Systems

TeamDynamix (UGA)

- Replying to email on a case puts notes in the case
- Can use link in email to view full case
- Notes are at the top of the email (may vary by unit)
- Replying to a Closed or Resolved case Reopens the case
  - Please do not reply with a Thank You

Service Now (USG)

- Replying to email on a case puts notes in the case
- Can use link in email to view full case
- Notes are farther down in the body of the email
- Replying to a Closed or Resolved case DOES NOT Reopen the case
  - Must use link in email to reopen

Understanding the ticketing systems

Two Ticketing Systems

TeamDynamix (UGA)

- Sending an email and copying other people does not give them access to ticket updates/status access to the ticket
- Only the sender is associated with the ticket as the Requestor
- Responses from others on original email (copying Onesource) will not add to ticket updates
- Attempt to work "within" the case by replying to original case email in order to capture all updates

Service Now (USG)

- Sending an email and copying other people does not give them access to ticket updates/status access to the ticket
- Only the sender is associated with the ticket as the Requestor
- Responses from others on original email (copying OneUSGSupport) will create a new, separate ticket
- Attempt to work "within" the case by replying to original case email in order to capture all updates

Service Desk – HRWeb / EITS

Resolved Ticket Messages

From: Assigned Support Staff Name <notify@teamdynamixapp.com>
Subject: Team Dynamix Service Request Updated (Case subject)

What Changed

Assigned Support Staff Name updated this service request on DATE.

Comments: Changed Status from "Statusx" to "StatusX".

RESOLVED MESSAGE WILL BE INCLUDED HERE

Service Request Updated

(Original Case Details)

Case Link

https://uga.teamdynamix.com/TDClient/Requests/TicketRequests/TicketDet.aspx?TicketID=XXXXXXXX_

----TEAMDYNAMIX DO NOT ALTER OR REMOVE THIS CODE----
1tMH77VyrB3/otKz1Aj3v3y8Qbp7/MNluV2iheHZZ2yF3xQWAj3CXg4pQ7USOwc7Ndli+SU+
----TEAMDYNAMIX DO NOT ALTER OR REMOVE THIS CODE----

Service Desk – OneSource
Resolved Ticket Messages

From: Assigned Support Staff Name <notify@teamdynamixapp.com>
Subject: OneSource Case Updated (Case subject)

----- Original Message -----
Status Update:
Assigned Support Staff Name updated this service request on DATE.
Update Comment:

Changed Status from "Statusx" to "StatusX".

RESOLVED MESSAGE WILL BE INCLUDED HERE

OneSource Service Request Details

Original Case Details)
Case Link
https://uga.teamdynamix.com/TDClient/Requests/TicketRequests/TicketDet.aspx?TicketID=XXXXXXXX_

----TEAMDYNAMIX DO NOT ALTER OR REMOVE THIS CODE----
1tMH77VyrB3/otKz1Aj3v3y8Qbp7/MNluV2iheHZZ2yF3xQWAj3CXg4pQ7USOwc7Ndli+SU+
----TEAMDYNAMIX DO NOT ALTER OR REMOVE THIS CODE----

Service Desk – OneUSG Connect

Resolved Ticket Messages

From: usg@service-now.com <usg@service-now.com>
Subject: Your incident USG-INCXXXXXXX has been resolved -- Ref:USG-MSGxxxxxxx

Your incident USG-INCXXXXXXX has been resolved and will automatically close in 5 days.
If you feel the issue is not resolved, please click the following link to reopen your incident:
Click here if your issue was not resolved USG-XXXXXXXXX

Caller information: , Name: , Email: , Business phone: , Short description: , Description: = ORIGINAL CASE INFO

Comments:

Date/Time – Assigned Support Staff Name

RESOLVED MESSAGE WILL BE INCLUDED HERE

Full URL https://usg.service-now.com/incident.do?sys_id=xxxxxx

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DO NOT DELETE ANYTHING BELOW THIS LINE! This information is required in order to process your request.
Notification ID: Incident Resolved customer

August 8, 2019

UGA Financial Management System Module Awareness

Fiscal Year 2019 is….almost there!

- Central Accounting continues to work on closing FY19.
- June 2019 has been closed!
- Financial statement analysis has identified a number of incorrect chartfield combinations and improper use of various chartfields, which in some cases, have resulted in unnatural balances on balance sheet accounts which must be corrected.
- *We will communicate to the OneSource listserv as soon as we have completed the year-end close.*
- The analysis has uncovered many "lessons learned" and in the coming weeks, we will share these lessons with you.

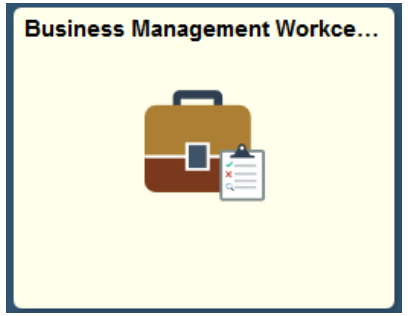
Budget Management

August 10th Updates

- Budget Planning and Salary Setting forms will be reopened for units to begin planning for the FY21 BPSS cycle.
- Position Funding Distribution Full Chartstring report will be available in the UGA Reports (Current) > BPSS > FY20 Static Reports folder. This report, along with an excel template, provides a breakdown of FY20 submitted position funding by chartstring.
- The names of the reporting folders will be renamed to “UGA Reports (Current)” for reports that are up to date with current data, and “UGA Reports (Archive)” for reports that use old department trees, legacy account numbers.

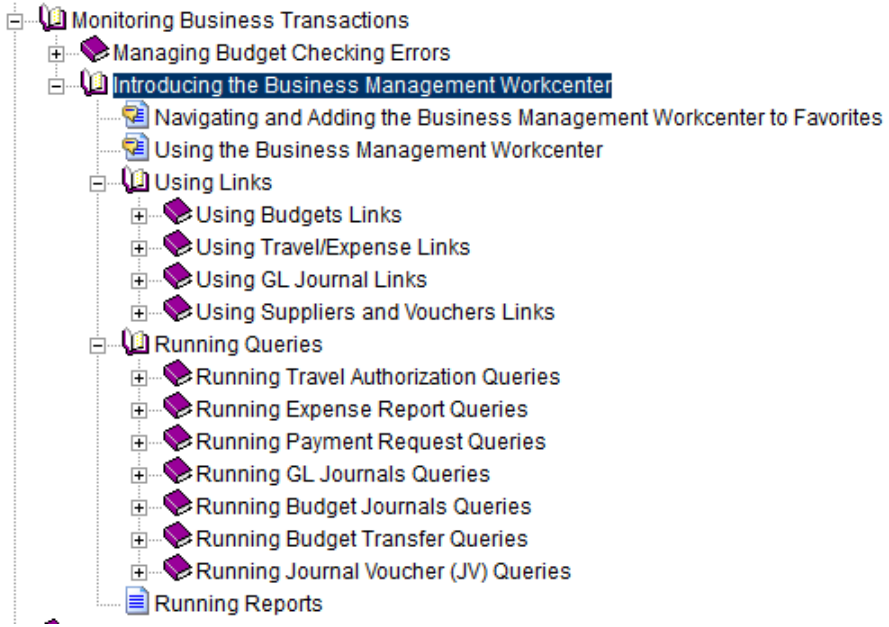
Financial Management

August 10th Updates



New Business Management Workcenter Tile

- Added to "UGA Financials" homepage (tab at the top)
- Available to anyone with this homepage
- No action needed to enable this
- Introducing the Business Management Workcenter topic in the Training Library



Financial & Budget Management

August 10th Updates

Adding Combo Codes

- System will not allow new combo codes against non-transactional departments and other budgetary-only chartfields
- Currently combo codes can be created with non-transactional departments and other Budget Only Chartfields. This results in payroll being posted to departments not valid for transactions. DBIs are required to correct the data.
- During combo code creation an additional check will be performed on the department; if the department is non-transactional, it will be rejected.
- Additional check of Fund, Program, Department and Class to ensure it is not Budgetary only – if any field is budgetary only, the Combo code will be rejected.

- **If you request a Combo Code that is not allowed, we will contact you for revisions.**

Budget Status Report Version 2.1
Now Available

- The Budget Status Report in the Data Warehouse (powered by Tableau) is getting detailed transaction information in the form of a transactions log.
- Effective Wednesday, August 7th, a new link will appear under the Budget Status Report heading on OIR's Operational Reports page.
- You will be able to filter by a variety of different chartfields with department being the only *required* filter.
- The current tutorial for using the Budget Status Report v2.0 is available in the Training Library.
  - Updates will be made soon to reflect the added functionality.

Budget Status Report Version 2.1

Now Available

Budget Status

The Budget Status Cube provides budget-to-actual information at the summary and detail levels. This cube will download as an excel spreadsheet and utilizes "pivot table" functionality. To use the cube you need to be a valid user, connected to the 02 Restricted VPN, and your machine is bound to the active directory.

- Budget Status Cube

- Budget Status Paginated Report (Version 1.0)

The Budget Status Report (Version 2.0) provides budget-to-actual information at the summary and detail levels for multiple financial departments. 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.

- Budget Status Report by Department, Fund, and Account
- Budget Status Report by Fund, Department, and Account
- Budget Status Report by Class and Department

The Financials Transaction Log is a detailed list of transactions based on a combination of selected parameters. A Department parameter must be selected before any transactions are populated on the 'Transaction List'. Filtering can only be done on the 'Select Parameters' page. In alignment with other Tableau reports, you can export the output to Excel as a crosstab by clicking download in the toolbar at the top right of the report.

- Financials Transaction Log

Accounts Payable

Supplier Name vs. DBA Name

- Supplier name and the "Doing Business As" (dba) name are two different fields in PeopleSoft. Our vendor records are established by legal vendor name, as they have to be verified with the IRS TIN matching system. Not every record has a DBA (the majority don't), but every record does have a legal name, so we have the legal name mapped. It avoids modifications.
- Example: Supplier ID VN0002810
  - Supplier Legal Name = Shane Todd
  - DBA Name = Chick-fil-a
  - 44 different Legal Suppliers registered as a DBA version of "Chick-fil-A"

- Training available for Searching for a Supplier Address by Name or DBA Name in the Training Library

Travel and Expenses

Itemizing expenses

Itemizing daily lodging expenses:

- Section 4.2.1 of the USG's Business Process Manual (BPM)
- Policy indicates we can modify the reimbursement form without prior approval by USG; however, it must include all required elements as in the original form.
- The Standard Business Travel Forms shows that all expenses, not just lodging, are to be itemized by date and type.
- We plan to have additional discussions with state officials to gain a better understanding around the need for itemization. Based on some initial research, it is common practice at other institutes of higher education to itemize lodging and other travel expenses. Benefits include the approver's ability to see individual expense lines by day and UGA can accurately report daily expenses for each traveler if the data is collected in that manner. To assist travelers with data entry, the system allows you to quickly copy expense lines to pre-populate lodging rates for additional travel days. The OneSource Training Library includes training for Copying Expense Lines.

August 8, 2019

OneUSG Connect Module Awareness

Commitment Accounting
Known Issue – Resolved

- **USG resolved the issue and this week's encumbrance ran correctly.**
- Known Issue:
- The new encumbrance calculation did not complete successfully 7/28.
- The OneUSG Connect personal service encumbrance calculation is a two step process. The first step of the process is to zero out the current encumbrance amount. The second step is a new encumbrance calculation.
- Because of this issue, personal service encumbrances in OneUSG Connect and the UGA Data Warehouse will be zero.
- Personal Service encumbrances in UGA Finance will remain unchanged from last week (calculation from July 21st).

Manager Self-Service
Employee Self-Service

- How do I update an employee's Business Phone number in OneUSG Connect and the UGA Directory?
  - Submit a ticket to OneUSGSupport@UGA.Edu with:
    - Requesting update to Business Phone number
    - EMPLID of the employee that needs updating
    - New phone number
    - *EX: "Please update the business phone number for John Doe 1809999 to 7065421234."*
- Updating this phone type will then allow the phone number to be sent downstream to UGA Active Directory and the change will be reflected in UGA Systems, such as People Search.
  - Note that if you are maintaining a directory that is not fed by active directory, it will not be updated.

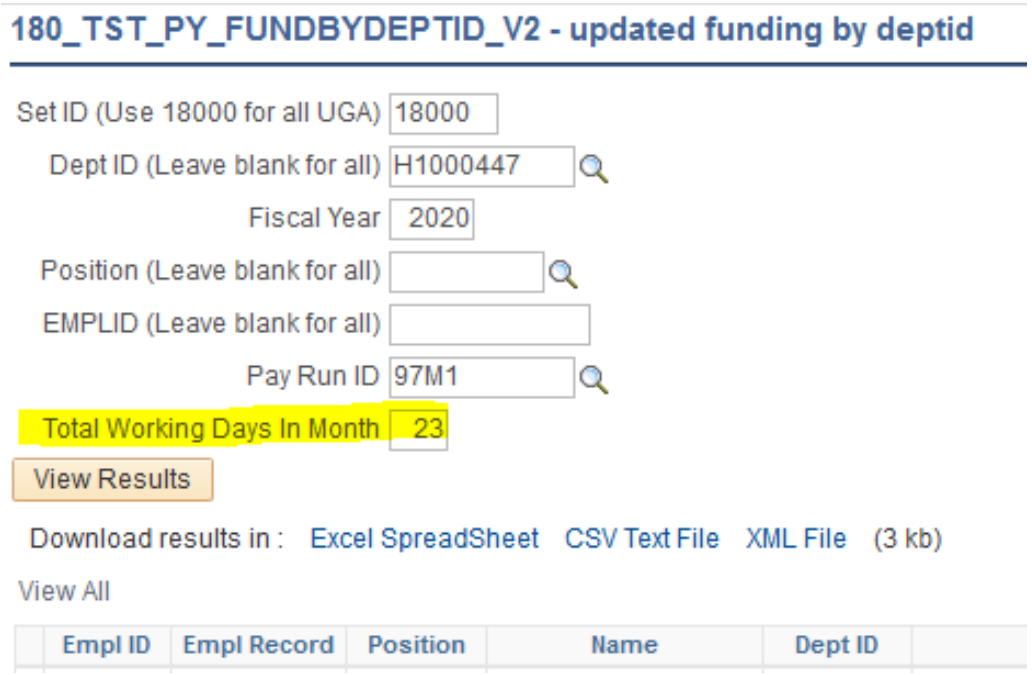
HR: New Query Sneak Peek!

- Update to the **Funding by DeptID and PayID** query in the Payroll section

- Uses the number of working days in the month to estimate the gross amount of pay
  - Does NOT take into account any absences

- Hyperlink on the EmplID that opens the Job Data page in a separate window
  - Must have Job Data view access for this to work

- Hyperlink on Position Funding Request that opens in a separate window



HR: New Query Sneak Peek!

- Columns in addition to EmplID, Rec No, Name, Position, DeptID, and Dept Description:

First 1-6 of 6 Last

Pay Group	Pay Group Description	Pay Frequency	Pay Run ID	Pay Period End	Comp Frequency	Pay Period Comp	Combo Code	Distrb %	Estimated Comp Dist	Estimated Pay Period %
18G	Graduate Assistants	Monthly	97M1	07/31/2019	Monthly	1525.38	18570300091001	100.000	1525.38	99.99
18Y	12 Month Faculty	Monthly	97M1	07/31/2019	Monthly	8151.41	18570300091001	100.000	8151.41	99.99
18G	Graduate Assistants	Monthly	97M1	07/31/2019	Monthly	0.00	18570300091001	100.000	0.00	56.52
18G	Graduate Assistants	Monthly	97M1	07/31/2019	Monthly	1525.38	18570300091001	100.000	663.20	43.47
18G	Graduate Assistants	Monthly	97M1	07/31/2019	Monthly	2090.60	18570300091001	100.000	1181.64	56.52
18G	Graduate Assistants	Monthly	97M1	07/31/2019	Monthly	1555.91	18570300091001	100.000	879.43	56.52

- Per Period Comp is the monthly compensation rate from the job record
- **Estimated** Comp Distribution is based off of funding
- **Estimated** Pay Period Pay Period % is based on effective date

- If you have Query Viewer access, search for 180_TST_PY_FUNDBYDEPTID_V2

New Employee info if no background check

Reminder- when a person is hired and they are not a current employee OR do not have a background check processed (ie. hired in a position of trust), immediate outreach from Central HR will take place to gather essential data needed to create the employee's record in OneUSG Connect. If a new hire does not provide this information timely, this can affect their start dates and provisioning access to systems. This includes graduate students, student workers, and temporary workers.

Central HR takes the following steps to obtain this information. These start dates are adjusted 5 days forward in the "All Approvals Obtained" email:

- Immediate outreach to affected new hire via email
- 3 attempts are made to continue this effort to resolve and hire this person into OneUSGConnect.
- If no response is received, Central HR contacts the **HR Liaison and the departmental contact listed on the hiring proposal** for assistance.
- A final notice outreach is sent to the new hire
- If no response is received and the hire is 2 weeks in the queue and past effective date, Central HR will send a notice to the department notifying them that this hire's action will be cancelled if Central HR is not notified.

Graduate Assistantships
Workbook process update

- Data is being uploaded into UGAJobs and OneUSG Connect in batches.
- All data should be visible for Units to review 8/13 to 8/15
  - Standard Hours
  - Job Code Changes
  - FY20 Compensation Adjustments
  - Return from Short Work Break
- Review via *Employee Job Data* query
  - Review compensation amount
  - Review Empl Status – W = Short Work Break => no pay check
- Updates/corrections, submit Ad Hoc Salary Request and/or Short Work Break form

Graduate Assistantships

One-by-one update

Through MSS request in OneUSG Connect:

- Use Ad Hoc Salary Change Request
- Enter a separate request for each position that needs to be updated
- Include the Standard Hours/FTE if appropriate
- If necessary, indicate Return from Short Work Break changes in the Comments section on the second page of the request

- In OneUSG Connect, adjust funding as needed via a Change Funding Request – for ALL Assistatntship positions, no matter which way the positions were continued

Graduate Assistantships
Example of Compensation Changes

Example, Before August 2019

- Total $13,876 (Annual Academic Year Salary $41,628 @ 1/3 time) August 16-May 15
- Payment Schedule:
  - August – May payments: $1,386.60 each month on Academic Payroll dates

Example, After August 2019

- Total $13,876 (Annual FY Salary $55,503 @ 1/3 time) August 16-May 15
- Payment Schedule:
  - August 31 payment: $770.89
  - September 30 – April 30 payments: $1,541.78 each month
  - May 31 payment: $770.89

- Examples only. Hire and termination dates should be appropriate to work expected.

Graduate Assistantships
Payment Plan for Tuition and Fees

- Allows a student on a graduate assistantship to defer payment of the current term's tuition and fees, health insurance, and parking permit. The deferrable balance is calculated after all actual and expected financial aid is applied to the student account. Under the payment plan terms, the deferred balance is due in equal installments throughout the semester.

https://busfin.uga.edu/bursar/grad_asst_payment_plan_documentation_fall_spring.pdf

Questions/Suggestions/Concerns

Project Feedback

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