Weekly Status Call

December 5, 2019
Training Courses

• *NEW* Approving GL Journals and Budget Transactions

<table>
<thead>
<tr>
<th>Format/Location</th>
<th>Date/Time</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self Service</td>
<td></td>
<td>OneSource Training Library</td>
</tr>
<tr>
<td>Recorded</td>
<td></td>
<td>Video Link</td>
</tr>
<tr>
<td>Interactive Webinar</td>
<td>January 7 10:00 a.m. - 11:30 a.m.</td>
<td>Click here to register</td>
</tr>
<tr>
<td>Interactive Webinar</td>
<td>January 22 1:30 p.m. - 3:00 p.m.</td>
<td>Click here to register</td>
</tr>
</tbody>
</table>
# Training Courses

## Express Direct Retros Training

- Overview of the Express Direct Retro functionality within OneUSG Connect.
- Available on the [OneSource Training page](#) for System Managers.

<table>
<thead>
<tr>
<th>Format/Location</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Self Service</td>
<td></td>
<td>OneSource Training Library - coming soon</td>
</tr>
<tr>
<td>Recorded</td>
<td></td>
<td>Video Link - coming soon</td>
</tr>
<tr>
<td>Interactive Webinar</td>
<td>December 6; 8:30 a.m. - 10:30 a.m.</td>
<td><a href="#">Click here to register</a></td>
</tr>
<tr>
<td>Interactive Webinar</td>
<td>December 11; 10:00 a.m. - 12:00 p.m.</td>
<td><a href="#">Click here to register</a></td>
</tr>
<tr>
<td>Interactive Webinar</td>
<td>December 18; 8:30 a.m. - 10:00 a.m.</td>
<td><a href="#">Click here to register</a></td>
</tr>
</tbody>
</table>
Training Courses

Project Status Report Training
• The new Payroll Tab will be covered at these sessions.
• Register via Professional Education Portal (PEP).
• More info on the SPA webpage.
  • December 9, 10:30 a.m.

UGAmart for Beginners Training
• December 12, 9:00 a.m. - noon
• Register via Training & Development

UGAJobs Training
• Available to units by request. Central HR will come to you!
  • Email hrweb@uga.edu to make the request for your unit.

Pcard Training - online!
• Located on the Procurement site
  • Initial PCard Training
  • Refresher PCard Training
  • Procurement Card Information
Upcoming Downtimes/Updates
Finance & OneUSG Connect

- **December 6 at 5:00 p.m. – December 9 at 7:00 a.m.**: Financial & Budget Management Feature Release – PUM (PeopleSoft Update Manager)

- **December 6 at 6:00 p.m. – December 10 at 7:00 a.m.**: The OneUSG Connect site will be unavailable. Please refer to the [OneSource News page](#) for additional information and updates.

- **December 7**: Budget Management Feature Release – No downtime expected (moved from November to December)

- **December 13 from 10:00 p.m. to 2:00 a.m.**: Financial Management & Budget Management Operating System Maintenance
System Updates
Clear Your Cache

• With the upcoming releases, it's important to ensure you can access the latest version of the software.

• While you should clear your web browser's cache, cookies and history periodically in order to prevent or resolve performance problems, **it is best practice to ensure these steps occur after a system upgrade.**

• The browser cache is a temporary storage location on your computer for files downloaded by your browser to display websites.

• For more information on how to clear your browser’s cache, please visit the OneSource Training Library by clicking **here.**
Network Maintenance

January

Network maintenance **Saturday, January 25** beginning at **6:00 a.m.**

---

**Outages (on-campus):**
- Campus Internet access and campus information systems
- Systems that use services in the Boyd Data Center
- UGA websites hosted in the Boyd Data Center
- All UGA Central Authentication System (CAS) and UGA’s Single Sign-On (UGA SSO) to log in to UGA-provided information systems including
  - Athena, Banner Administrative System
  - Degree Works
  - eLearning Commons (eLC)
  - UGA Financial Management System
  - UGA Budget Management System
  - UGAJobs
  - UGAmart
  - OneUSG Connect
  - OneUSG Connect Benefits

**Outages (off-campus):**
- UGAMail, websites hosted by UGA
- Virtual Private Network (VPN)
- ArchPass, powered by Duo
- Information systems hosted by EITS
- All systems behind the Central Departmental firewalls will experience an outage to their access to the UGA network.

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Additional details and progress reports will be posted to [status.uga.edu](http://status.uga.edu) and on the [EITS Twitter feed](https://twitter.com/EITS_UGA). For more information, please contact Jeff Farese.
Holiday Communication Schedule

**Reminders!**

No Tuesday Tips
- 12/24
- 12/31

No Weekly Status Call
- 12/26
- 1/2
## USG Requirement

**CyberSecurity and Ethics Training Update**

<table>
<thead>
<tr>
<th></th>
<th>CyberSecurity</th>
<th>Ethics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total % Complete</td>
<td>33%</td>
<td>35%</td>
</tr>
<tr>
<td>Total Incomplete</td>
<td>14,746</td>
<td>11,988</td>
</tr>
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</table>
A standalone payroll transaction list is now available in the Data Warehouse. It is located on the Operational Reports page on the Financials tab.

Location: https://oir.uga.edu/data/oper/payroll/transaction/

Questions and/or enhancement requests related to this report should be submitted to onesource@uga.edu.

The transaction logs below offer 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
- Payroll Transaction Log
Data Warehouse
Payroll Transaction List
### Data Warehouse

#### Payroll Transaction List

<table>
<thead>
<tr>
<th>Journal</th>
<th>Date</th>
<th>Account</th>
<th>Employee Name</th>
<th>Fund</th>
<th>Program</th>
<th>Department</th>
<th>Class</th>
<th>Oper Unit</th>
<th>PC Bus Unit</th>
<th>Project</th>
<th>Activity</th>
<th>Chartfield1</th>
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<td>1/4/2019</td>
<td>522100</td>
<td></td>
<td>10600 - Tuition</td>
<td>11140 - Instruction,Dept.</td>
<td></td>
<td>11800 - Tuition</td>
<td>#NA</td>
<td>#NA</td>
<td>#NA</td>
<td>#NA</td>
<td>#NA</td>
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<tr>
<td>553100</td>
<td></td>
<td></td>
<td></td>
<td>10600 - Tuition</td>
<td>11140 - Instruction,Dept.</td>
<td></td>
<td>11800 - Tuition</td>
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<td>#NA</td>
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<td>#NA</td>
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<tr>
<td>553200</td>
<td></td>
<td></td>
<td></td>
<td>10600 - Tuition</td>
<td>11140 - Instruction,Dept.</td>
<td></td>
<td>11800 - Tuition</td>
<td>#NA</td>
<td>#NA</td>
<td>#NA</td>
<td>#NA</td>
<td>#NA</td>
</tr>
<tr>
<td>552100</td>
<td></td>
<td></td>
<td></td>
<td>10500 - Tuition</td>
<td>11140 - Instruction,Dept.</td>
<td></td>
<td>11800 - Tuition</td>
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<tr>
<td>553128</td>
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<td>11800 - Tuition</td>
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<td>#NA</td>
<td>#NA</td>
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<td>#NA</td>
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<tr>
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<td></td>
<td></td>
<td>10600 - Tuition</td>
<td>11140 - Instruction,Dept.</td>
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<td>11800 - Tuition</td>
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<td>11140 - Instruction,Dept.</td>
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<td>11800 - Tuition</td>
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<td>#NA</td>
<td>#NA</td>
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<tr>
<td>553100</td>
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<td></td>
<td>10600 - Tuition</td>
<td>11140 - Instruction,Dept.</td>
<td></td>
<td>11800 - Tuition</td>
<td>#NA</td>
<td>#NA</td>
<td>#NA</td>
<td>#NA</td>
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</tbody>
</table>

#### Encumbrance Actual Amount

<table>
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<th>Encumbrance</th>
<th>Actual Amount</th>
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<tr>
<td>$0.00</td>
<td>$1,298.96</td>
</tr>
<tr>
<td>$0.00</td>
<td>$76.03</td>
</tr>
<tr>
<td>$0.00</td>
<td>$17.76</td>
</tr>
<tr>
<td>$0.00</td>
<td>$271.48</td>
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<tr>
<td>$0.00</td>
<td>$218.95</td>
</tr>
<tr>
<td>$0.00</td>
<td>$15.62</td>
</tr>
<tr>
<td>$0.00</td>
<td>$8.37</td>
</tr>
<tr>
<td>$0.00</td>
<td>$1,345.73</td>
</tr>
<tr>
<td>$0.00</td>
<td>$75.48</td>
</tr>
</tbody>
</table>
The new Job Data data app in Simpler will be available for users first thing tomorrow morning, December 6th. It is located on the Simpler homepage under the OneUSG Connect heading.

Location: https://simpler.uga.edu

Questions and/or enhancement requests related to this report should be submitted to onesource@uga.edu.
Notice that you can search by both EmplID and/or name for this search parameter.
Pay close attention to the format of the names when typing in a full name. You can also search just by last name as you see in the search box above.
• Note that FIN Dept ID is populated entirely with 74999999.
• HR Dept is not currently available
The Payroll Transactions data app was released on November 22nd. The search tips from the previous slides apply to this data app as well. These transactions are being pulled from UGA Financials.
Simpler

December 2019 Updates

**All updates included in the December release will be available by tomorrow, December 6th**

- Private sharing functionality has been fixed.
- Training on saving, sharing, and deleting shortcuts is available in the Training Library.
- At this time, we would like to ask all of you to review your shortcuts to ensure that you don't have any publicly shared queries.
- Hint: If your shortcut is visible under "shared shortcuts" it has been made public.
• Other Updates:
  • Purchase Order Data App:
    • Purchase Order Reference was added to both the search screen and the results. This allows you to search by the "E" UGAMart PO ID.
    • Business Unit 18000 was removed from the PeopleSoft PO ID and Vendor ID columns in the results
  • Transactions – Budget & Actuals Data App:
    • Class code was added as a column
    • Request access and request new data links have been updated
December 5, 2019

Financials, Budgets, Reporting
PUM Upgrade
Financial Homepages

Current: Navy background color

New: Stegeman Grey background color
PUM Upgrade
Creating a Payment Request

Current

New

Only selected address is displayed and cannot be edited.

Payment Address

Edit Feature
Current Transaction Line information listed with Chartstring on Basic Information tab

NEW! Chartstring entered on Chartfields tab
PUM Upgrade
GL and Budget Journal Spreadsheets

• Must be used starting **12/09/2019**
• Most of the updates in the spreadsheets will not be apparent to users.
  • Some columns have been rearranged in the GL Journal uploader spreadsheet, but these are the unused columns to the right of Description.
• Request the updated versions from [onesource@uga.edu](mailto:onesource@uga.edu).
PUM Upgrade
Approving an Expense Report

Current

Requires scrolling to view all information, and travel dates are not listed

New

All information now viewable without scrolling

Travel Information
### PUM Upgrade

**Approving a Budget Journal**

#### Current

<table>
<thead>
<tr>
<th>Line</th>
<th>Account / Class Field</th>
<th>Budget Reference / Operating Unit</th>
<th>Fund Code / PC Business Unit</th>
<th>Program / Project</th>
<th>Department / Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>521100</td>
<td>2020</td>
<td>11300</td>
<td>12200</td>
<td>10002999</td>
</tr>
<tr>
<td></td>
<td>Salaries-Professional/Admin</td>
<td>USD</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### New

<table>
<thead>
<tr>
<th>Line</th>
<th>Amount</th>
<th>Account / Class Field / ChartField 1</th>
<th>Budget Reference / Operating Unit</th>
<th>Fund Code / PC Business Unit</th>
<th>Program / Project</th>
<th>Department / Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>54,868.00</td>
<td>S21100</td>
<td>2020</td>
<td>11300</td>
<td>12200</td>
<td>10002999</td>
</tr>
</tbody>
</table>

- Course/Lab Fees: -4,282.00 USD
- [Account] 409901
- [Class] 41507
- [ChartField 1] 
- [Bud Ref] 2020
- [Oper Unit] 
- [Dept] 20963400
- [Fund] 14100
- [PC Bus Unit] 
- [Program] 11100
- [Project] 

2 rows
PUM Upgrade

AR Cohorts Only: Copying a Bill

Current
Generates single copy with new invoice number

New
Allows creation of up to 99 editable copies

Creating Multiple Copies of a Bill training – New!
For training regarding any of the new updates and features to PUM, please visit the OneSource Training Library.
PUM Upgrade

Known Issue

• Issue: When reviewing an item, such as a journal, in the Classic view, clicking on "Return to Search" will log a user completely out of the system.

• Affects: Journal Entry (GL journals), Travel Authorizations, Vouchers, and Paycycle Manager.

• Functional workaround: Use the Previous or Next in List buttons to move through your search results or navigate back to the search page from the left menu or the breadcrumbs at the top of the page.

• Keep track of any PUM known issues via the OneSource Known Issues page.
Department Reorganization

Financial Tree Restructuring

- **Time frame:** Now
- **Goal:** Tree changes in place for Budget Development in March.
- **Final requests for new departments and new tree structures must be submitted via ticket by January 9th and finalized prior to January 15th.**

- **Complications and efforts that should be considered:**
  - Lack of comparability between years, particularly in Hyperion and the Data Warehouse
  - New department set up must be requested individually and manually by the unit. There is no bulk uploader for this process.
  - Departments can’t be inactivated immediately for a number of reasons, so the Units will have to routinely and carefully monitor for inappropriate activity to departments that are no longer to be used.
  - Departments can’t be inactivated while they are referenced by
    - Open Encumbrances
    - Open projects
    - Active Combo Codes
  - Changes that have to be made to reflect new departments:
    - Combo Codes
    - Position Funding
    - Banner Detail codes
    - Deposit Detail codes
    - Speedtypes
    - F&A return and Offsets
    - Carryforward: (Will be posted for 2020 department with the carryforward; Actual, Revenue Budget and Expenditure Budget Journals must be done to move the carryforward.)
    - Providers of Intra-University services will have to be provided updated chartstrings. Examples; Mail Services, Telephone Services
Holiday Month End Reminders

Finance Transactions

Dec 24

• **AP Journal Vouchers - Month end deadline:**
  Must be budget-checked and have workflow completed by noon on the last business day of the same accounting period (month).

Dec 24

• **GL Journals - Month end deadline:**
  Last day of the month (month end close calendar).
  • Technically, can be entered until Dec 31 if your department is open during the holidays.

Jan 2

• **Budget Amendments - Month end deadline:**
  Budget amendments (journals or transfers) dated within the month being closed must have a valid budget check status and must reach Commitment Management for final approval by noon on the first business day of the following month.
Finance
Query Updates

• UGA_TE_DEPARTMENT_REPORT
  • Prompts have been added to provide more functionality.
Finance

Query Updates

- UGA_KK_BUDGET_TRANSACTONS_3
  - The columns have been updated to match the order of the columns on the Budget Spreadsheet Uploader
5.2 Release
New Look for Position Funding Pages

• MSS Change Position Funding pages have been changed from the classic view to the new fluid view.

This is the only change to MSS Change Position Funding.
Manager Self-Service
Emergency Contact Information

• It is important to note that emergency contact information is contingent on the employee supplying that information in OneUSG Connect.

• There are two ways that an employee's emergency contact information can be accessed by users within the college/unit.

1. The reports to manager can obtain the emergency contact information via MSS.

   • Navbar > Manager Self-Service > Job and Personal Information > View Employee Personal Information. From there, select your employee and then use the emergency contact link.

   • Must have query viewer in OneUSG Connect.

This is different from what was communicated last week.
Updated contacts list:

- [https://hr.uga.edu/_resources/pdf/Workforce-Planning-Recruitment-Teams.pdf](https://hr.uga.edu/_resources/pdf/Workforce-Planning-Recruitment-Teams.pdf)
- List can be found on the [HR Employment Administration webpage](https://hr.uga.edu/).

Designated team members are available to assist or perform actions related to a unit’s **position management and/or hiring needs**.

Teams are available to assist with spring/summer hiring season to **proactively** plan for position creation/modifications, postings, timing of hiring proposal submissions, etc.
Absence Management

Awareness

- Remember the **360 annual leave limit** at calendar year-end
  - Enter leave requests to prevent forfeiting annual leave in error
  - Run the *Employee Absence Balances* query within the Workcenter to determine employees approaching the 360 limit
    - Must consider the December accrual
  - Forfeited leave is a process that will run in OneUSG Connect, no action is needed
Absence Management

Awareness

• Employees and managers when entering/approving leave requests make sure that the appropriate year is being entered
  • If taking off in January, ensure that 2020 is entered and not 2019
OneUSG Connect

5.2 Release Scope

• **Self Service**
  • Decision Support for Termination
  • Classic Plus for End-User Pages

• **Time and Absence**
  • Enrollment Matrix Expansion
  • Vet Med Weekend Differentials

• **UPDATE – RELEASE POSTPONED:**
  • Detaching Time & Absence Approvers from Reports to Updates
  • Postponed until GA Tech Go Live in March 2020
  • Updates to the Reports To will continue to override the Time & Absence Approver
Onboarding & Employee Services
Separation Notices

• The Onboarding & Employee Services team (formerly Onboarding & Records team) are now sending out the required Georgia Department of Labor Separation Notices (Form DOL-800). The notices will be prompted by the department's MSS transactions for terminations and retirements. These notices are mailed to the employee's home address.

• Separation Notices are distributed for any faculty or staff member who is separating from the University and will no longer be paid.

• If you have any questions regarding the notices, please contact the Onboarding & Employee Services team at hrweb@uga.edu or by calling 706-542-2222.
Payroll

New W-4

- Very different from previous versions
- IRS is not requiring all employees to complete the revised form
- Withholding tables will work with both the new and prior year forms.
- Certain employees will be required to use the new form: those hired in 2020 and anyone who makes withholding changes during 2020.
- To effectively use the estimator, it is helpful to have a copy of your most recent pay stub and tax return.
- **Please note: if you do not submit a new form, withholding will continue based on your previously submitted form.**
- Link to W-4 is [here](#).
- The IRS has also published Frequently Asked Questions that you may find helpful as you complete the form ([https://www.irs.gov/newsroom/faqs-on-the-draft-2020-form-w-4](https://www.irs.gov/newsroom/faqs-on-the-draft-2020-form-w-4)).
- More to come regarding the new version of the W-4 tax information screen in Employee Self-Service.
Payroll

2019 Corrections for W-2s

• Start reviewing 2019 payroll information now so overpayments can be submitted as soon as possible.

• Tickets should be submitted to oneusgsupport@uga.edu by 5pm on December 23, 2019 with the Overpayment Request attached and Subject: Overpayment.

• If employee is repaying a 2019 overpayment by check, Payroll must receive payment from employee by noon January 2, 2020 in order for 2019 W-2 wages to be corrected.

• Please hand deliver these checks to Payroll since mail delivery time is out of the employee's control.

• If payment is not received by then, employees will owe more money because federal and state tax cannot be adjusted per IRS regulation.
Beginning 12/10/2019, MSS transactions (termination, position funding, etc.) will no longer be routed to the originator of the transaction.

- Due to upcoming changes resulting from the release of the Express Direct Retro functionality.
- Relatively small impact ~10% of transactions.
- Will only impact new transactions.
- May require departments to reevaluate their MSS approvers.
- Use 180_SEC_DEPT_APPROVERS- Departmental Approvers in System Manager Work Center.
- Submit any updates needed to OneUSGSupport@uga.edu.
Time & Labor

HR/Payroll Deadline

- This is the deadline to have all job data updates entered and approved to be guaranteed for payment during the payroll processing.
- This deadline is typically 7 days prior to the time/absence approval deadline.

Holiday Payroll Dates and Deadlines

December 2019

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2020 UGA Practitioner Payroll Processing Schedule
Bi-Weekly On Cycle Payroll Schedule

<table>
<thead>
<tr>
<th>Pay Period Begin Date</th>
<th>Pay Period End Date</th>
<th>HR/Payroll Deadline</th>
<th>Mgr Absence/Time Approval by 10am</th>
<th>OneUSG Confirm Date</th>
<th>Pay Date</th>
<th>Pay Run ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/15/19</td>
<td>12/28/19</td>
<td>12/23/19 (12 pm deadline)</td>
<td>12/30/19</td>
<td>01/03/20</td>
<td>01B1</td>
<td></td>
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<td>12/29/19</td>
<td>01/11/20</td>
<td>01/13/20</td>
<td>01/14/20</td>
<td>01/17/20</td>
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<td></td>
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<tr>
<td>01/12/20</td>
<td>01/25/20</td>
<td>01/27/20</td>
<td>01/28/20</td>
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<td>02/23/20</td>
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<td>03/09/20</td>
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<td>03/21/20</td>
<td>03/16/20</td>
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<td></td>
</tr>
</tbody>
</table>

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Questions/Suggestions/Concerns

Contact Us
onesource.uga.edu
onesource@uga.edu
or
oneusgsupport@uga.edu