

- Annual Oracle Maintenance Release 5.30
 - Release Schedule
 - FPLAY Database Refresh
 - Supported Browsers
 - User Experience Changes
 - Module Updates and Changes
 - Preparing for Release 5.30
- Calendar Year-End Updates
- Miscellaneous Production Support Information
- Q&A

Annals of the International
Release 5.5



- Schedule for Application of Release 5.30
 - All GeorgiaFIRST users should log out before **7:00pm, Thursday, November 30**
 - Production willia

Annual Oracle Maintenance Release 5.30

- Will consist of:
 - PeopleTools to 8.55.19
 - PeopleSoft Update Images (PI)
 - Images 20 - 23
 - BOR modification retrofits
 - Approximately 60
 - Resolved Known Issues - 8

Annual Oracle Maintenance Release 5.30

- URL Changes

- At Georgia Summit, we shared that there will be new URLs
- Good news! ITS has come up with a method that will not require users to change their existing URLs.
- The only exception is FPLAY database - will have a new URL

FPLAY Database Refresh Schedule

- Plan to refresh week of December 18
 - Will be unavailable approximately 4 business days.
 - An announcement will be sent out in November with exact dates.
- Will also have a URL change
- Per announcement that will be sent out, notify ITS if you have users setup for Training that you wish to retain.

Supported Browsers for PT8.55.19

- Make sure Technical staff at your institution are aware IE10 will no longer be supported as of Release 5.30 (PT8.55.19).
- Browsers should be evaluated and updated as needed.
- Issues that may be encountered include lookups not returning results, Buttons not active on the page, etc.

Supported Browsers for PT8.55.19

Minimum Browser Requirements

Apple Safari for OS X:	8.x or later versions
Apple Safari for IOS:	8.0.2 or later versions
Google Chrome for Windows:	58.x or later versions
Google Chrome for Android:	5.x or later versions
Microsoft Internet Explorer:	11.x or later versions
Microsoft Edge:	25.10586 or later versions
Mozilla Firefox:	38.x or later versions

Supported Browsers for PT8.55.19

Refer to the following documentation:

- Browser Compatibility Guide for PeopleSoft Applications, PeopleTools 8.53-8.56
- Clearing Your Browser Cache Job Aid

http://www.usg.edu/gafirst-fin/documentation/category/general_job_aids_and_reference_documents

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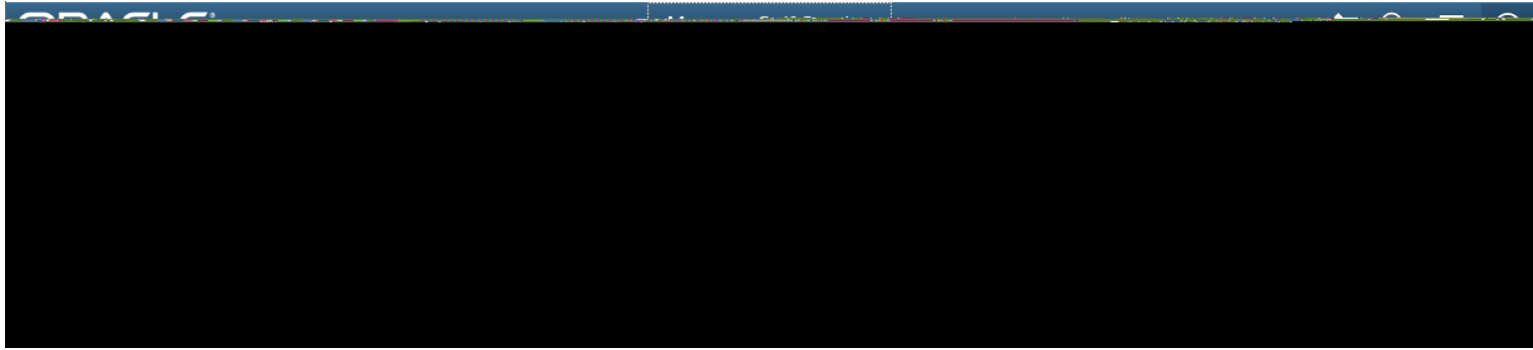
Annual Oracle Maintenance Release 5.30

- New Homepages
 - Employee Self Service (default)
 - Manager Self Service
- Tiles on Employee Homepage
 - Will be available based on your security
 - Tiles for WorkCenters (AP, Buyer, AM, GL)
 - Tile to access Pagelets

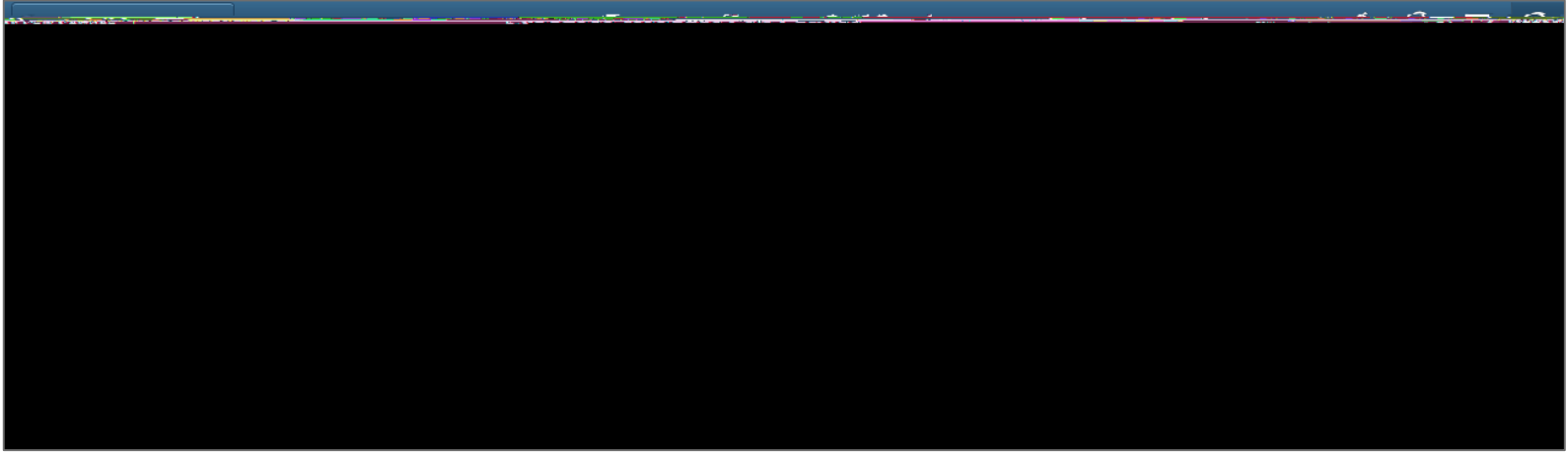
New Homepages



Manager Self Service Homepage

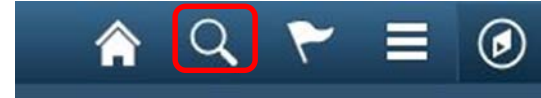


Manager Self Service



New Search Functionality

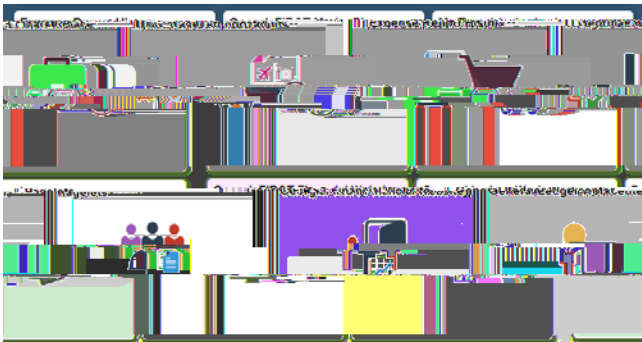
- Ability to search for:
 - Menu Navigation/pages
 - Transactions



- Search results will not be real time
 - ITS is still working to determine the frequency
 - Institutions should plan for transactional related searches to be behind (up to a day)

Pagelets – Updates and Changes

- Pagelets
 - No longer will display on user's homepage
 - Will be available as a tile



Employee Self Service

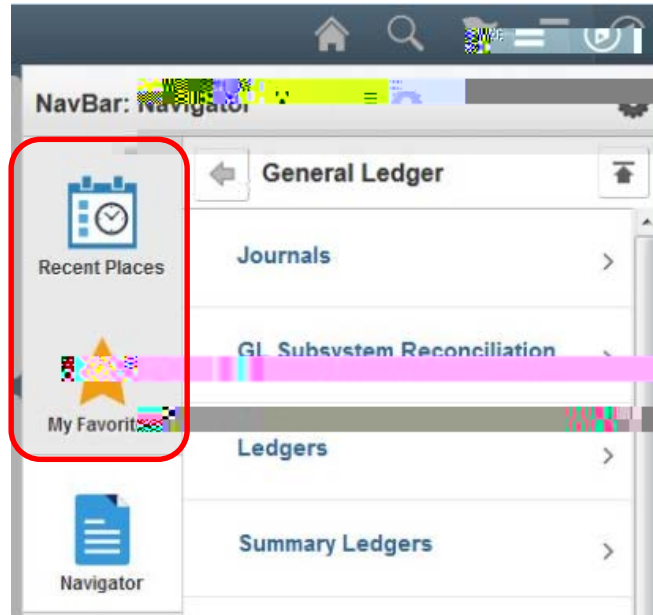
	Unit	Fund	Bud Ref	Year
BOR Budget to Actual w/ Acct	98000	10000	2017	2017
BOR Project Budget to Act w/Bref	98000	11920	2017	2017
RSA Revenue to Expense	98000	11921	2017	2017
BOR Trans Impacting Surplus	98000	11923	2017	2017
BOR Terminated Empl w/ Secury	98000	11930	2017	2017
BOR Budget to Actuals Projects	98000	11940	2017	2017
BOR Expense Budget to Actuals	98000	12210	2017	2017
BOR Revenue Budget to Actuals	98000	15000	2017	2017
My Reports	98000	21920	2017	2017
	98000	21930	2017	2017
	98000	40000	2017	2017
	98000	80000	2017	2017
	98000	90000	2017	2017

[Full Query Results](#)



Menu Navigation Changes

- Recent Places and My Favorites



~~Release 5.20 Module Updates and Changes~~

Journal and Voucher Upload Spreadsheets

- New Version of Journal and Voucher upload spreadsheets
- Will be posted to the GeorgiaFIRST website week of November 20th
- Current version of the spreadsheets will no longer work as of December 4th (following Release 5.30)

General Ledger– Updates and Changes

- New Department Manager Dashboard
 - Allows users to view financial data, including budgets, pre-encumbrances, encumbrances, and expenses in one location
 - Real time results rather than previous days data
 - Geared to non-traditional users
 - Department-level security
 - Drill down capability
 - Navigon BOR Me BOR Gen

The screenshot shows a web interface for the Department Manager Dashboard. The main content area displays a table with the following data:

Account	Total Budget Amount (Sum)	Pre Encumbered Amount (Sum)	Encumbered Amount (Sum)	Expense Amount (Sum)	Remaining Budget (Sum)
600000 (286)	49528960.000	1099230.160	486550.550	9737194.570	33820974.720

Travel and Expenses

Manager Self Service

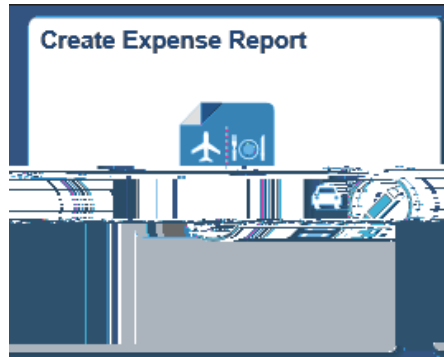
Employee Self Service

- Employee = YOU are the employee/traveler
 - Submit/View your personal transactions
 - These items can also be accessed via the Navigation bar

Manager Self Service

Travel and Expenses – Updates and Changes

- Fluid Expense Report Entry
 - Accessed from the Create Expense Report tile on the Employee Self Service homepage



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Travel and Expenses – Updates and Changes

Employee Self Service Expense Report

Report NEXT
Daphne Burch

Accounting Defaults

Destination Location ATLANTA

Reference

Creation Date 11/13/2017 Daphne Burch

No expenses have been entered.

Travel and Expenses – Updates and Changes

Expense Report

Meeting in Atlanta

Total (1 Item) 0.00 USD

Monday, November 13, 2017

Emp Mileage T1 31.03 USD

Emp Mileage T1 - 11/13/2017

*Date 11/13/2017

*Expense Type Emp Mileage T1

Description

Mileage

*Reimbursable Miles

*Miles 150 x 0.5350

Payment Details

Payment N/A (e.g. Mileage)

Additional Information

*Originating Location SAVANNAH

*Destination Location ATLANTA

Exceptions

Non-Reimbursable No

No Receipt No

- Fluid Expense Report Entry
 - Designed for very basic Expense Report entry
 - Cannot apply Travel Authorizations or Cash Advances
 - Cannot edit Accounting Defaults to update all lines of Expense Report AFTER lines are added
 - Must make changes BEFORE lines are added by clicking Accounting Defaults
 - » Rhg
 - » Ehrfhv
 - » Rfgruh
 - » Rfhur

Travel and Expenses – Updates and Changes

- Fluid Expense Report Entry
 - Can create and Save **Fluid Expense Report** (from desktop or mobile device), then Modify/Submit via the **Classic Expense Report** navigation (Employee Self-Service > Travel and Expenses > Expense Reports > Modify)
 - Fluid Expense Report Job Aid will be posted to the GeorgiaFIRST website

Travel and Expenses – Preparation for the Release

- Workflow approval best practices
 - All Expense transactions should be in Pending or Approved Status prior to release 5.30
 - Fully approved or sent back to the traveler
 - Run the **BOR_EX_WF_BLACK_HOLE** query to monitor approvals in process

Travel and Expenses – Resolved Known Issues

- KI9.2-58_EX Project Missing from Default Accounting for Expense Report

The screenshot shows the Oracle Expense Reports interface. The main form is titled 'Create Expense Report' and includes fields for 'Business Purpose' (Attend Meetings), 'Destination Location' (ATLANTA), and 'Report Description' (Meeting in Atlanta). The 'Actions' dropdown menu is open, showing options such as 'Choose an Action', 'Adjustment Cash Advance', 'Apply/View Cash Advance(s)', 'Associate Travel Authorization', 'Copy Expense Lines', 'Apply Accounting For Report' (highlighted), 'Export to Excel', and 'User Defaults'.

The screenshot shows the 'Create Expense Report Accounting Defaults' dialog box. It includes a table with the following data:

Accounting Summary	%	*GL Unit	Fund	Dept	Program	Class	Bud Rept
	100.00	98000	10000	7310000	16400	11000	2017

Buttons for 'Add ChartField Line', 'Load Defaults', 'User', and 'OK' are visible at the bottom.

- Travel Authorization Default Creation Method of Copy From a Template causes Accounting Details to be blank

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ePro & Purchasing – Updates and Changes

- Implementing Supplier Workflow
 - Supplier Entry will remain the same as it is today
 - Users having the BOR_PO_VENDORS_MAINT role will enter new Suppliers and when saved the s 1.4 (i)1.5nw(i)1.5nuO

ePro & Purchasing – Updates and Changes

- Implementing Supplier Workflow
 - Users with the BOR_PO_VENDORS_APPROVE role will receive an e-mail notification when a supplier is added as Unapproved
 - E-mail address and Workflow options must be specified on User ID profile
 - This is a ‘pooled’ approval, meaning all users with the role will receive notification, but only one approver will need to take action

ePro & Purchasing – Updates and Changes

- Implementing Supplier Workflow
 - Approval action can be taken in the following ways:
 - Accessing the Worklist page, via the NavBar
 - Clicking the link in the notification e-mail to access the Approve Supplier page
 - Navigating to the Approve Supplier page



ePro & Purchasing – Updates and Changes

- Implementing Supplier Workflow
 - Prior to Rel 5.30 being applied, ITS recommends that all Unapproved Suppliers be updated to Approved or Inactive.
 - If a supplier is not updated prior to the release, users should be able to Approve the supplier from the Approve Supplier page, using the drop down option. The Approve/Deny buttons will not be available.

ePro & Purchasing – Updates and Changes

- Implementing Supplier Workflow
 - ITS will provide a listing of all Unapproved suppliers on November 28th to the DBI approver at each Institution.
 - ITS will provide a listing of users who have both the ‘Authority to Enter’ and ‘Authority to Approve’ user preferences on November 28th to the Security Admin at each Institution.



UNIVERSITY SYSTEM
OF GEORGIA

ePro & Purchasing -

ePro & Purchasing – New Known Issues

- **KI9.2-71_PO- Express PO - Amount Only**
Unable to add an 'Amount Only' PO via the Express PO's page.

Accounts Payable (AP) – Resolved Known Issues

- **KI9.2-47_AP** - Submit Approval Button Remains Active After Selecting for Voucher Approval
- **KI9.2-48_AP** - Voucher Inquiry Error Message Value Too Long
- **KI9.2-52_AP** - Voucher Print Functionality No Longer Displaying Supplier Address
- **KI9.2-53_AP** - Vouchers Saved for Later Not Displaying Invoice Information Tab

Asset Management – Updates and Changes

- Change to Asset Management WorkCenter
 - The

Asset Management – Updates and Changes

- Asset Management documentation and Business Processes have been updated to include the new changes.
- Will be available on GeorgiaFIRST Financials website week of November 20th

Budget Prep Redesign – Updates and Changes

- Majority of changes will be included in Release 5.30
- Required due to implementation of OneUSG Connect
- Used by all GeorgiaFIRST institutions for FY2019 Budget development
- Includes additional enhancements proposed by Budget users in Design Session (March 2016)
- User Acceptance Testing:
 - Cohort 1 institutions
 - Tentatively scheduling December 12-13 in Athens

Preparing for Release 5.30

- How to prepare:
 - Communicate system downtime
 - Change Management:
 - Prepare users for user interface changes
 - ITS will provide a short YouTube video and job aids
 - Download Journal & Voucher spreadsheets
 - Review Supported Browser Information
 - Plan for use of new features
 - Supplier Workflow setup
 - Department Manager Dashboard

Preparing for Release 5.30

- How to prepare:
 - Data Best Practice Recommendations:
 - Suppliers
 - Need to be in **Approved** or **Inactive** status
 - Workflow Approvals
 - Transactions should be in **Pending** or **Approved** status
 - Includes Travel Authorizations, Cash Advances, Expense Reports, AP Vouchers, Journals, Requisitions, Purchase Orders

Annual Per Diem Updates (CONUS/OCONUS)

- Working on the annual per diem updates
- Estimating mid to late December for updates to be applied to production
- An announcement will be sent once they are complete

CY2017 1099-MISC Reporting

- There are no IRS updates for tax year 2017 that affect the USG.
- Copy B template is being updated to increase font size and improve placement of address.
 - Updated Copy B will be available no later than mid January
- The 1099 User Guide for 2017 will be reviewed and updated.
- An announcement will be sent once it is available.

Continuous Production





Questions?



Release 5.30 Production Support WebEx Questions and
Answers Support Document

Questions	Answers
<p>Why can the Submit Approval not be set up as a batch process like budget checking? If you have to pick an address when a vendor has multiple addresses, why does it not automatically change on the payment page?</p>	

Can an institution remove certain tiles if they aren't using those pages?

No, you will not be able to remove the delivered tiles. However, the tiles you will see will be controlled by Security. For example, if you aren't using travel and expenses, those tiles will not show.

What about cash advances? We don't use those.

Then you should n12.5 (wi)2.7 - .

Will the BOR Spreadsheet (Journal Upload)
work with the new version of PeopleSoft?

MORE INFORMATION AND SUPPORT: For business impact emergency issues, contact the ITS Helpdesk immediately at 706-583-2001 or 1-888-875-3697 (toll free within Georgia). For non-urgent issues, contact the ITS Helpdesk via the self-service support website at http://www.usg.edu/customer_services. (This service requires a user ID and password. E-mail helpdesk@usg.edu to obtain self-service login credentials.)

ADDITIONAL RESOURCES: For information about ITS maintenance schedules or Service Level Guidelines, please visit http://www.usg.edu/customer_services/service_level_guidelines. For USG services status, please visit <http://status.usg.edu>.

ADDITIONAL RESOURCES

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