

RELEASE NOTES

The purpose of these Release Notes is to inform PeopleSoft Financials technical staff and functional users of the scheduled 5.70 release of BOR functional application enhancements.

Release Notes and other accompanying documentation for this release can be found on the [GeorgiaFIRST Financials website](#).

Release 5.70

General Information	
Business Processes and Job Aids	Changes to the following Business Processes and Jobs Aids have been included in this release: None
Known Issues	Resolutions to the following Known Issues have been included in this release: None
Technical Information	
Database	
Prerequisites	
Technical	
Functional	

Module Specific Information

Accounts Payable (AP)	
Modifications to Existing Processes	
<p>AP Payment Request New Approvals</p>	<p>Before Release 5.70, Payment Requests could be approved at the Department, Amount and AP Approver Levels</p> <p>After Release 5.70, new optional workflow for Payment Requests will be available including Additional Department Approver, Project Approver and Additional Project Approver.</p> <p>To test new optional Workflow in FPLAY, please submit a ticket to the ITS Helpdesk. Once tested, the Workflow can be requested for Production.</p>
<p>Voucher Build Process Update</p>	<p>Navigation: Accounts Payable > Batch Processes > Voucher > Voucher Build</p> <p>e-Invoices created for POs where the distribution was set to Distribute by Amount, submitted through the GeorgiaFIRST Marketplace, were not being successfully built into vouchers. The voucher build process was not tabulating the line amount correctly.</p> <p>The Voucher Build Process was modified so that it will now tabulate the Line Amount correctly and build Catalog Invoices into vouchers.</p>

Budget Prep (BP)

Modifications to Existing Processes

HCM Import Process Updates

Navigation: BOR Menus > BOR Budget Prep > Budget Prep Processing > HCM Import

The HCM import process was updated to take advantage of new setup options including:

- The HCM Import will now use new Pay Group flags to determine if a pay group should be included in import
- The HCM Import will now adjust vacant hourly position budgets to account for prior year hours setup
- The HCM Import will now import Department Budget Table funding even if there is no matching compensation setup. One frequent use of this type of setup is to fund Overtime separately from regular earnings - the OVT funding row will now import to Budget Prep.
- The HCM Import will now check General Deductions when importing positions with Health Benefit elections. If the employee has no matching nonzero deduction, health insurance plan information will not be imported.
- Hourly positions will now be import with NAHRLY comprate codes regardless of setup. This is in line with SSC guidelines on compensation setup and helps avoid calculation errors within budget prep.
- Positions that import with FTE = 0 will now be identified in the .out process log after the process completes.

<p>Fringe Update Process Changes</p>	<p>Navigation: BOR Menus > BOR Budget Prep > Budget Prep Processing > Fringe Update</p> <p>The Fringe Update process was modified to use new setup options. These options include the ability to suppress health insurance estimates if the Health Insurance flag on Pay Group Setup is set to 'N.' Additionally, the process will use the new Retirement Max to limit retirement amounts.</p>
<p>Personal Services Post Process Update</p>	<p>Navigation: BOR Menus > BOR Budget Prep > Budget Prep Processing > Personal Service Post</p> <p>Before Release 5.70, entries in the Budget Adjustment field prorated based on the number of hours per year on hourly positions.</p> <p>After Release 5.70, entries in the Budget Adjustment field will no longer be prorated for hours per year. The value should be added to budget directly with no adjustments for hours per year.</p>
<p>Reset Raise Process Updates</p>	<p>Navigation: BOR Menus > BOR Budget Prep > Budget Prep Processing > Reset Raise Dates</p> <p>Before Release 5.70, entries in the Budget Adjustment field prorated based on the number of hours per year on hourly positions.</p> <p>After Release 5.70, the Reset Raise process will no longer apply the hours per year adjustment from Budget Adjust when the process runs for hourly positions.</p>

Page Changes	
<p>Budget Prep Setup Page Updates</p>	<p>Navigation: BOR Menus > BOR Budget Prep > Budget Prep Setup</p> <p>Previously, vacant position budgets were adjusted to the new year's hours without considering the budgeted hours used in the previous year.</p> <p>After release 5.70 the following will be available on the Budget Prep Setup pages:</p> <ul style="list-style-type: none"> • New fields for prior year hours will be available to improve budget calculations on vacant H and J paygroup positions. • New flags will be available for Pay Group setup to allow institutions to specify if pay groups should calculate Health Insurance or should be included in Import. • A new field will be available in Fringe Setup to handle the Retirement contribution maximum.
<p>Personal Services Page – Override Checkbox Update</p>	<p>Navigation: BOR Menus > BOR Budget Prep > Budget Prep Data Update > Personal Services</p> <p>Before Release 5.70, the Override checkbox behavior was incorrect and did not limit edits to the Proposed Budget field.</p> <p>After Release 5.70, the Personal Services update page will be updated to correct Override checkbox behavior - Proposed Budget will not be directly editable until the Override option is selected.</p>

<p align="center">Personal Services Page – Hourly Rate Calc FTE</p>	<p>Navigation: BOR Menus > BOR Budget Prep > Budget Prep Data Update > Personal Services</p> <p>Before Release 5.70, the page returned an error if FTE = 0.</p> <p>After Release 5.70, the hourly rate calc will correctly handle cases where FTE = 0.</p>
<p align="center">Personal Services Page – Hourly Rate Calc Budget Adjust Field</p>	<p>Navigation: BOR Menus > BOR Budget Prep > Budget Prep Data Update > Personal Services</p> <p>Before Release 5.70, entries in the Budget Adjust field were prorated based on the hours per year setup for hourly positions.</p> <p>After Release 5.70, the Budget Adjust field behavior will be corrected to no longer apply hours per year adjustments on hourly positions.</p>
<p align="center">Personal Services Page – Raise Fields</p>	<p>Navigation: BOR Menus > BOR Budget Prep > Budget Prep Data Update > Personal Services</p> <p>Before Release 5.70, users could enter negative raises on a position which would then load back to Job Data.</p> <p>After Release 5.70, raise fields (Merit, Equity and Promotion) will now return an error if the entered raise is negative and require selecting the Skip option to allow saving with a negative raise. The Skip option will prevent Job Data from loading back to OneUSG Connect.</p>

eProcurement (ePro)/Purchasing (PO)	
Modifications to Existing Processes	
eProcurement Workflow Changes	<p>Before Release 5.70, if an eProcurement requisition needed to route to an approver with approval authority at more than one Business Unit (i.e., another institution), it would not always route as expected.</p> <p>Workflow for eProcurement requisitions was adjusted such that an eProcurement requisition will route to the UserID of the approver within the Business Unit from which the requisition originated. This will allow the requisition to route to a user with approval authority for more than one (1) institution.</p>

General Ledger (GL)	
Modifications to Existing Processes	
Department Expense Dashboard - ORG Budgets	<p>Navigation: BOR Menu > BOR General Ledger ></p> <p>Ledger Group prompt added along with the ORG Ledger. ORG Budget data now displays on the Department Manager Expense Dashboard in addition to APPROP and PROJ_GRT Budget data.</p>

Other Notes	
Next Scheduled Release	<p>PeopleSoft Financials Release 5.72 is currently scheduled for Friday, February 18, 2022. You will receive a reminder of when this update occurs.</p>
More Information and Support	<p>For business impact issues, contact the ITS Helpdesk at helpdesk@usg.edu or https://www.usg.edu/customer_services/about_us/contact/</p>