

Q & A from the Budget Prep Updates Wimba, 3/2/2010

The following questions were submitted by participants during the Wimba training session on Budget Prep Updates.

1. What is the timeframe to pull this EV5 7/1 eff data?
 - a. The epoh009 file from ADP will contain the data on the max effective dated row as of the date that the process is run. The only exception to this is if the max effective dated row has zero compensation (i.e., for 6/1 EFA rows). In that case, the compensation from the prior row will be pulled in the epoh009 file. This is the data that will be loaded into the Budget Prep module.
2. Are Budget Prep Tables synched to BOR Reporting Instance for real-time query access?
 - a. The Budget Prep Tables will be synched to the BOR Reporting Instance once the Budget Prep Module is available.
3. Are any other position data updated by budget load or only the Earnings distribution (pertaining to the summer faculty data entry)?
 - a. The list of tables/fields that are updated by the epbh011 is being developed and will be added to the training documentation when it is complete.
4. Can the budget parameters be altered after the data has been loaded in case BOR makes changes in merit effective dates?
 - a. The setup parameters may only be entered once. However, if there are merit raises that need to be incorporated after the setup has been done, those may be added through “what-if” analysis or directly to specific positions through the data update pages.
 - b. To alter a raise effective date, use Business Process “Resetting Raise Effective Dates” (BP.020.090), which provides instructions for making changes to the raise effective dates.
5. What security will we need in ADP to be able to run these budget processes?
 - a. ADP is working with SSC to determine the role that the various EV5 Budget Prep menu items will be assigned to. The role information will be provided before release of the EV5 Budget Prep menu items.

6. When will these reports be available?
 - a. The Position Validation and Warning reports will be available upon request. Users should submit a TIR to SSC to request that these reports be run.
7. Why do we all have to send a TIR to Shared Services when it's these validation reports will be required by everyone? Can't they just send them out to us?
 - a. The validation reports are requested from Shared Services, so you can have them at the time you are extracting, rather than sending them to everyone on 3/15 or some arbitrary date. Schools will be extracting at different times depending on their size and information flow on their individual campus.
8. What about employee records with no position number?
 - a. The only way that the epoh009 can tie an incumbent to a position is if the position number is populated on the employee's job data. If an active position does not have an employee assigned to that position, the epoh009 will show that position as vacant. Ideally, if a school was not planning to utilize position numbers for their Summer Faculty, they would need to run the epoh009 prior to blanking the position number out for the summer. When the 7/1, 8/1, 7/1, and/or 6/30 rows are inserted, they will have position number populated.
9. Will all employees in lump sum positions be included, even Student Assts., etc.?
 - a. Employees in Lump Sum positions are not extracted, just as in the past.
10. Will we have more detailed documentation available on the specific criteria on the extract and load criteria before we run the process?
 - a. The PSFIN Budget Prep User's Guide will be published to the GeorgiaFIRST website. Within the User's Guide are the Business Processes "Processing HR/Payroll to BP Load" (BP.040.010) and "Exporting Changes to HR/Payroll" (BP.040.030), including all Record and Field names used in creating the Load and Export files.
11. When will this be available? My panel doesn't look like this now?
 - a. The beta test sites are currently finalizing their testing. When their testing is successfully completed, it will be migrated to production in EV5. We expect the EV5 menu items to be available at approximately the same time as the PSFIN Budget Prep menu items.

12. Have any of the table names changed?

- a. The table names have not changed. A list of records (tables) used in Budget Prep is included in Lesson 8 of the Macon Workshop presentation, as well as in the PSFIN Budget Prep User's Guide.

13. Last year we couldn't run just the G-1 by department, we could only run all departments. Has this been resolved?

- a. Yes. The G-1 may be run by department now.

14. Will any future dated rows in ADP cause problems with adding these budget rows?

- a. The epoh009 process will pick up the job data from an incumbent employee from their max effective dated row, even if that row is future-dated. The only data element that may be picked from a prior row is annual rate, which will be picked up from a prior row if the max effective dated row has zero compensation (i.e., 6/1 EFA rows).

15. Can we get a complete list of tables/fields updated by this process?

- a. We have requested that ADP provide a simple list of tables/fields updated by the epbh011 process. We will include that in our training documentation when we receive it. In the meantime, we can provide the ADP technical spec documents that also provide that information – please let us know if a school would like that information.

16. Can we request the position validation report more than once to have time to resolve any issues and make sure that they get resolved?

- a. Reports can be requested more than once.

17. Are only positions with budget flag = Y extracted?

- a. No, all active positions are pulled into the epoh009 regardless of whether the Budgeted Position flag is checked on the Position Budget Status page in Position Data.

18. Will there be an announcement when available?

- a. A Shared Priority will be sent from SSC when the Budget Prep menu items in EV5 are available. This Shared Priority will also include the security role information for these menu items. We will also cross-post this announcement on the First-LB list as well.
- b. Yes. An announcement will be sent by OIIT when the Budget Prep module in PSFIN is available.

19. What role do we need in ADP to extract the data?

- a. ADP is working with SSC to determine the role that the various EV5 Budget Prep menu items will be assigned to. The role information will be provided before release of the EV5 Budget Prep menu items.

20. Will we get some idea of what situations will generate errors on the extract process?

- a. The Warning and Position Validation reports should help schools identify situations where data in EV5 needs to be corrected prior to extracting and loading in Budget Prep. Please keep in mind that manual corrections can still be made and may be required after data is loaded into Budget Prep and subsequently in EV5, just as it was in PS.

21. Can you share with us some of the common validation problems the beta group ran into?

- a. We are trying to include documentation on the items that the beta schools have run into in our training documentation. The Position Validation reports and Warning reports are an outgrowth of what the beta sites felt that they required to adequately validate their data.

22. If these don't match, is TIR the method to report the discrepancy? Who would that go to: SSC or OIIT?

- a. Issues dealing with EV5 or output from EV5 should be directed to the SSC through a ticket. Issues dealing with PSFIN Budget Prep or output from Budget Prep should be directed to OIIT. SSC and OIIT are working very closely on the Budget Prep product so misdirected issues or issues requiring work on both sides will be handled regardless of where the item is sent. To address the specific question, if there is a discrepancy between totals in PSFIN and EV5, only one ticket to either area needs to be created.

23. Does the process have to be run by the same user that uploads the file?

- a. The same PC/Terminal has to be used, regardless of who actually performs the function. The file is stored on that local machine.

24. Was this info conveyed to campus employees who work directly with ADP on a regular basis or only budget employees?

- a. Information regarding the Budget Prep training went out on First LB only, in the same way that it has been done in prior years. However, a subsequent training session detailing the validation of the data coming from Budget Prep going into EV5 will be scheduled and HR users will be encouraged to attend.

- b. Budget Prep users are encouraged to incorporate their HR staff in their initial validation efforts to ensure that the data going into the Budget Prep module is as clean as possible.
- 25. Are there any types of job/position validation we can run before the load to get an idea of conditions that would generate errors in the load process to resolve them before load is attempted?
 - a. There will be error and warning reports generated when the epbh011 process is run. The error reports will indicate rows that will not be loaded due to an error condition. The warning reports will note data that is changing for an employee. Although the warning reports may seem rather long for some schools with numerous changes, we encourage each school to review these reports line by line to verify that the appropriate employee changes will be loaded in the epbh011 process.
- 26. How will the summer faculty data entry during this process impact the load process since their data will be changing?
 - a. The coordination between the Budget Prep team (ADP lead Ed Sorrentino) and the Summer Faculty team (ADP lead Pam Dillard) is being handled by Sherry Cohen. My understanding is that Sherry will be verifying the timing of how the Budget Prep process and the Summer Faculty process should work together.
- 27. Will HR still need to add a new position for us to be able to access it in Budget Prep?
 - a. All new positions must be setup in HR/ADP first. After the initial extract from ADP, a subsequent extract from ADP would need to be performed to load into Budget Prep. That subsequent extract should be run on the specific department that position resides in. This operates the same as last year. The nightly feeds from ADP do not automatically populate Budget Prep data. Some of the nightly feeds are used to collect description information, such as names for BP Reports and extracts.
- 28. Will blank position number in Job Record be considered an error condition?
 - a. A blank position number in Job will not generate an error condition in the epoh009 process; as noted previously, an employee with no position number will not be shown as the incumbent for any position. We are including the condition of “Active Employee with no Position Number” in our warning reports so that schools can review these employees to determine if the lack of position number is legitimate. Also as previously noted, if an incumbent is tied to a position in the Budget Prep module, the position number will be populated on the 7/1, 8/1, 1/1, and/or 6/1 rows that are loaded in the epbh001 process.