

SUBJECT: GeorgiaFIRST HRMS Project Release 3.32

PURPOSE: Release of BOR fixes and enhancements (see details below).

TECHNICAL IMPACT:

DATABASE: Your PeopleSoft HRMS database has been upgraded with BOR Release 3.32, and is available. You can verify your release level by navigating to any page, hitting [CTRL][J], and verifying the last three digits of the Application Release field. Please note: during the release process, all server-side cache files are deleted; this may cause performance issues during initial page loads.

WORKSTATION: As with any release, we recommend clearing your internet browser cache files before logging in to your database.

SECURITY: Security modifications are a part of this release. See details below.

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| Functional Fixes and Enhancements by Module |
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BENEFITS

Create ERS/DEFCON File (BORIF28D) – This process is modified to list zero and negative amounts in the Trace File to alert users of the out of balance condition. These amounts must be corrected by editing the ERS/DEFCON Temp Table prior to being included in the monthly remittance file. Prior to the modification, zero and negative amounts were omitted from the Trace File.

Create ERS/DEFCON Report (BORIF28F) – This process is modified to list zero and negative amounts in the Trace File to alert users of the out of balance condition. The modification also includes the identification of the zero and negative amounts by a # symbol on the report. Prior to the modifications, zero and negative amounts were omitted from the Trace File and the report didn't identify those amounts.

Disability Plan Table – A 01/01/08 effective-dated row is inserted into the Disability Plan Table for benefit plans VLTD1, VLTD2, VLTD3, and VLTD4 to reflect the increase of the Maximum Monthly Benefit amount from \$7,500 to \$10,000 effective 01/01/2008. If an institution does not currently offer any of those plans, no row will be inserted.

Flat Rate Table – A 08/01/08 effective-dated row is inserted into the Flat Rate Table for flat rates FTD1, FTD3, and FTD4 to reflect the regular premium rates for faculty effective 08/01/2008. These Flat Rate Tables were not included in Interim Release 3.28a which inserted the new premium rates for Plan Year 2008.

Leave Accrual Summary – Dept (BORR026A) – This report is modified so it will include all employees having Balance Hours on their most recent accrual record, provided that their most recent accrual date is not more than one year prior to the report end date. A blank Benefit Plan field indicates that an employee's leave plan is terminated as of the report end date.

GENERAL

Auditing – Record-field auditing is now available for certain fields on certain records. Additions, deletions, or changes to specified fields will be written to the BOR_PSAUDIT table. Users can create queries using this table to determine when changes to the database were made and by which user. Additionally, 24 delivered queries, will also be available. Refer to the new Business Process GEN110 – Record Field Auditing for a list of available queries.

HUMAN RESOURCES

Action/Reason Table – Correction on the typo of Termination reason: RWU – Receivership or Wind-up is made. Prior to the correction, that reason was spelled Receveivership or Wind-Up.

Employee Termination Process – This is a new process that identifies Active employees who are no longer working, and then allows users to run a process to terminate them. This is a three part process:

1. Employee Termination Extract (BORR054) – This process extracts inactive employees who have not received a paycheck during a particular time period users specified to a temporary table, TERM_BOR. The output for this process is the new Employee Termination Extract report, BORR054.
2. Employee Termination Temp Table – This page allows users to choose which employees should be terminated. The existing Employee Termination Process Report (BORR055) allows users to view which employees have been chosen for termination before proceeding to the 3rd process below.
3. Employee Termination Process (BOR_TERM_CI) – This new Application Engine process inserts the Termination Job Data row for the chosen employees.

Path: Board of Regents > BOR HR > Utilities > Employee Termination Process

A new business process HR 520 – Employee Termination Process is created to detail the steps required to run this three part process.

Job Function Table – Access to that table is now available for HR users to add, delete, or correct any Job Function.

- Users with the BOR HR Administrator role will have Add, Update/Display, and Include History accesses
- Users with the BOR HR Manager role will have Add, Include History, and Correct History accesses
- Users with the BOR View Only role will have View Only access

Years of Service Report (PER003) – This report is modified to allow users to run the report by either the Hire Date (Date hired at current Institution) or Service Date (Date hired into University System). In additions, three columns are added to the report: Service Date, Service Yrs and Service Mths.

PAYROLL

Check Reconciliation Reports (BORR015B) – These reports are modified to include information for the Reporting Period End Date identified when the Create Check Recon Temp Table process is run as follows:

- Issued Checks – This report is modified to include checks contained on the Check Register Report (PAY004). If a check issued within the Reporting Period was also reversed within the same Reporting Period, that check will be included on the Checks Reversed report instead.
- Checks Reversed – This report is modified to include checks reversed during the Reporting Period and include the Off Cycle indicator and Pay End Date to which the reversal is attached.
- Checks Reconciled From Bank Checks File – This report is modified to include the Off Cycle indicator and Pay End Date to which the check is attached
- Outstanding Checks – This report is modified to include the Off Cycle indicator and Pay End Date to which the check is attached.

Note: If an off cycle check is issued and attached to a future period end date, and has not been cashed, it will be included in the report.

- Unprocessed Manual Checks – This report is modified to include the Off Cycle indicator and Pay End Date to which the check is attached if applicable, this field is normally blank.

Create Check Recon Temp Table (BORR015A) – Formerly known as the Check Reconciliation Process, this process is modified to allow users to choose the option of loading a bank file by selecting the Load Bank File check box, or not to load a bank file when clearing checks manually by deselecting the Load Bank File check box. Prior to modifications, the only option available was to load a bank file. Users are reminded to always delete bank files uploaded previously before saving the page.

Existing business process PAY 460 is also renamed from Bank Reconciliation to Check Reconciliation to better identify the process function. It is also modified to reflect the menu changes of other check reconciliation related processes.

Create TRS/ORP Temp Table program (BORIF04A) – This program was modified to resolve Known Issue KI0094 - Maymester Payrolls containing SUM Earn Codes. Prior to the modification, when the Populate TRS/ORP Temp Table (BORIF04A) process was run, employees that followed an employee containing SUM earnings for May, were incorrectly populated with the SUM earnings values from the previous row until a change in Plan or Earnings type occurred. The modification was delivered on May 29, 2008, via Interim Release 3.31a.

Employee SSN Verification report (TAX109) – The report is modified to correctly select all eligible employees for reporting, including multiple-job employees whose employee records have different hire dates. Prior to the modifications, if an employee had multiple employee record numbers in PS_EMPLOYMENT with different hire dates, the program was selecting only the employee's maximum hire effective date. For example, if an employee had Empl Rcd #0 with a hire date of 8/10/07 and Empl Rcd #1 with a hire date of 8/20/07, the employee was incorrectly excluded when the hire date range of 8/1/07 - 8/15/07 was specified for reporting.

Garnishment AP Vendor Report Query (BORR123) – This query is modified to pull the active location address of the garnishment vendors. Prior to the modification, if multiple addresses were present for a vendor, duplicate rows for employees were displayed on the report for that particular vendor. This modified query will now first identify the address code selected on the Locations page on the Payee Table and check if the address code is referenced to an active address. If the address is active, the detailed address information will be pulled and displayed on the report. Otherwise, all employees' contributions towards that vendor will be dropped from the report. Therefore, it is essential for users to make sure the location code for an active address is populated on the Locations page.

Manual Check Reconciliation – The menu title is changed from Check Recon Adjust to Manual Check Reconciliation to clearly identify the functionality.

Existing business process PAY 460 – Check Reconciliation is also modified to reflect the menu change of this page.

Presheet Audit (PAY034) – This report is modified to include the message “Employee Retirement Plan not valid for Paygroup”. This message will be produced if employees in the B06 Paygroup, Benefit Program PAS are enrolled in Benefit Type 7Y, Benefit Plan ORPLMT. Note: Employees in the B06 Paygroup are not eligible for ORPLMT and it is recommended that the retirement enrollment be corrected prior to proceeding with the normal payroll processing.

Self-Service Functionalities

This section lists the enhancements and fixes delivered in this release for the Self-Service functionalities:

Self Registration

- Login Page – The message that is received when a Self Service user attempts to login to a locked account has been modified to include a reference to the “Forgot My Username or Password” link. Prior to this modification, the message directed the user to “Contact your local security administrator”.

Security Fixes and Enhancements

Modifications to Model Security:

BOR Copy User Profiles – A fix is applied that prevents the copied User Profile from retaining the emplid of the original User Profile in the ROLEXLATOPR table. Previously, the original emplid was retained until the EmplID field was populated for the new profile on the BOR User Profile ID page

BORBHR90 (BOR HR and Ben - Msc) – This permission is modified to turn on the access to the new Employee Termination Process.

Path: Board of Regents > BOR HR > Utilities > Employee Termination Process

BORDPP10 (Dfn Pay Proc - Set) – This permission is modified to turn off the “Add” access to the Earnings Table. Prior to the modification, when an institution added a new earn code which is not on the HRDM list and processed a payroll utilizing that earn code, the extraction process on HRDM would error out, and a DBI was required to resolve the issue.

BORHHR10 (Set HRMS HR - Set) – This permission is modified to turn on the Add, Update/Display, and Include History accesses to the Job Function Table.

BORHHR11 (Set HRMS HR - Set co) – This permission is modified to turn on the Add, Update/Display, and Correct History accesses to the Job Function Table.

BORHHR19 (Set HRMS HR - Set RO) – This permission is modified to turn on the read-only access to the Job Function Table.

ePAR Functionalities – Pilot Availability

This section lists the enhancements and fixes delivered in this release for the ePAR functionalities. Please note that ePAR is currently a pilot project and is not available at all schools.

Leave Balances

- Managers now have access to their employee’s Leave and Personal information under the Review Employee Personal Information page.

- **RELEASE DOCUMENTATION:** Detailed Release documentation is available at the HRMS/GeorgiaFIRST website: <http://www.usg.edu/gafirst/hrms> - Release Information - Current Release.

The following business processes have been recently created or updated, and are available for viewing on our website:

- GEN 110 – Record Field Auditing – This new Business Process explains how the BOR_PSAUDIT table is populated and provides a list of the delivered queries that users can run to extract data from this table.
- HR 520 – Employee Termination Process – This new Business Process details the steps needed to run the new Employee Termination Process. Please note that this business process replaces RPT 360 Employee Termination Processing Report.
- PAY 460 – Check Reconciliation – This business process is renamed from Bank Reconciliation to Check Reconciliation to better align the name to the functionality. A few changes are also made to reflect the menu changes of other check reconciliation process.
- RTP 310 – ERS_DEFCON Retirement Reporting – Modified to Page 1: In the General Information section, added a new Note 2, regarding ONLY current month Plan Termination dates are included in the ERS/DEFCON file, to the first bullet point.
- RPT 315 – Continuous Audit – Modified to change the report due date for 2008.
- RPT 360 – Employee Termination Process Report – This report is now obsolete and replaced by new business process HR 520 – Employee Termination Process.

Note: A summary of changes to the Business Processes may be viewed by clicking the ‘here’ link displayed at the top of the Business Process when opened directly from the HRMS web site. The changes may also be viewed by opening the Business Process and going to File>Properties>Summary>Comments.

The following other documentation has also been recently created or updated, and is available for viewing on our website:

- Foundation Table Changes/Additions – (Documentation>Foundation Table Changes/Additions)
 - FY08.03 – Benefit Program Table
- Known Issues – (Documentation>Known Issues)
 - KI0094 – Maymester Payrolls containing SUM Earn Codes
 - KI0095 – Site Foundation Table Changes/Additions to add the ORPLMT Benefit Plan to the PAS Benefit Program Table
 - KI0096 – 7/1/08 Job Data Rows with pay increases and the 2nd July Biweekly with pay increases
- Releases – (Release Information)
 - Added Release Announcement for Interim Release 3.31a (05/29/08)
- Version 8 Upgrade Information – (Release Information>Release Information – version 8>Version 8 Upgrade Information)
 - Updated the Browser and OS Requirements for V8 document

NEXT SCHEDULED RELEASE: The next scheduled release for Version 8 – 3.33 – is tentatively scheduled for August 11, 2008.