RELEASE NOTES

The purpose of these Release Notes is to inform PeopleSoft Financials technical staff and functional users of the scheduled 5.52 release of BOR functional application enhancements.

Release Notes and other accompanying documentation for this release can be found on the Georgia*FIRST* Financials website.

Release 5.52

General Information	
Business Processes and Job Aids	Changes to the following Business Processes and Jobs Aids were included in this release: • Department Manager Dashboard Setup • PO Open Encumbrance Dashboard Setup • Top Supplier Dashboard Setup
Known Issues	**None**
Technical Information	
Database	
	None
Prerequisites	
Technical	**None**
Functional	**None**

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Module Specific Information

Accounts Payable (AP)
Reports/Queries

1099-MISC Form Changes	Oracle changed the way files are generated when running the 1099 Report Post process to align with the IRS 1099-MISC NEC (non-employee compensation) and NON-NEC reporting guidelines. Following REL 5.52 when users retrieve the IRS Tax Files they will see two files available for download. Both files should be downloaded, verified, and submitted to the IRS.
	
	For 2019 reporting, the following updates were made to the 1099-MISC form:
	
	• The IRS updated Instructions for Recipient on the 1099-MISC form.
	
	• ITS modified the 1099-MISC printed form to ensure address information is visible through small standard window envelopes. The modifications to the printed form are:
	
	   o Increased address font size
	   o Additional whitespace between address and instructions
	   o Supplier Name 2 appears on single line with the Supplier Name
	
	For more information on the IRS updated instructions, see A20-002 "1099 Processing and Reporting for Calendar Year 2019 Available Now."
	
	For more information on 1099 processing, see the 1099 Processing User's Guide for CY2019.
	
	For more information on the new file requirements, see A20-006 "Additional File Required for Submission to IRS for CY2019 1099 Processing."

Budget Prep (BP)

Modifications to Existing Processes

New Merit Upload Process	**Navigation: BOR Menus > BOR Budget Prep > Budget Prep Processing > Personal Services Upload and Personal Services Post** New pages allow users to mass upload raises (merit, promotion, equity and supplemental) and post them to the Personal Services pages by position. Before this modification, users had to key in Merit and other raises on each position with no option to make mass changes.
HCM Export – "Distributed" Flag	**Navigation: BOR Menus > BOR Budget Prep > Budget Prep Processing > HCM Export** The HCM Export process defaulted the "Distributed" flag for Budget Table entries to 'Y' – this is now corrected to 'N.'
HCM Export – Funding End Date	**Navigation: BOR Menus > BOR Budget Prep > Budget Prep Processing > HCM Export** The process is corrected to use the correct funding end date from the Combination Code only. Before this modification, the HCM Export process used the funding end date from the prior Budget Table entry when staging Budget Table rows. This would sometimes bring incorrect dates forward.
HCM Export – Monthly Rate Rounding	**Navigation: BOR Menus > BOR Budget Prep > Budget Prep Processing > HCM Export** The Monthly Rate will be consistent with all other rate calculations and will round to six decimal places. Before this modification, the Monthly Rate rounded to two instead of six decimal places.

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HCM Export – Export Flag	**Navigation: BOR Menus > BOR Budget Prep > Budget Prep Processing > HCM Export** A new flag was added to allow rerunning the export without unlocking any other pages. Before this modification, lifting the export flag to allow an institution to run the HCM Export process again would unlock all pages for edits.
Reset Raise Effective Date	**Navigation: BOR Menus > BOR Budget Prep > Budget Prep Processing > Reset Raise Effective Date** Proration will correctly split raises for 10-month positions, and the distributed amount will match proposed budget after the Reset Raise Effective Date process runs. Before this modification, the Reset Raise Effective Date process prorated 10-month raises incorrectly and did not update the distributed amount to match the new proposed budget.

Reports/Queries

BOR_BP_PERS_ SERV_EXPORT	**Navigation: Reporting Tools > Query > Query Manager** A new query was created to retrieve data for the Merit Upload process. Query results can be edited for raise amounts then uploaded as part of the Merit Upload.
BOR_BP_PERS_ SERV_STG	**Navigation: Reporting Tools > Query > Query Manager** A new query was created to return data staged by Personal Services Upload as part of the Merit Upload process.

Page Changes

New Budget Prep Dashboard	**Navigation: BOR Menus > BOR Budget Prep > Budget Prep Dashboard** A new Budget Prep dashboard is now available. This dashboard simplifies navigation through the Georgia*FIRST* Budget Prep module.

Comments Fields on Data Update Pages	**Navigation: BOR Menus > BOR Budget Prep > Budget Prep Data Update > Grants, Revenues and Non-Personal Services** All three pages will have a comments box added for end user input.

General Ledger (GL)

Modifications to Existing Processes	

Journal Upload Template	Changes were made to the Journal Upload Spreadsheet to the Description column so that it will upload successfully if the character length exceeds the maximum 30 characters allowed. Before the modification, when users tried to upload a Journal Spreadsheet with a Description longer than 30 characters it would not upload. ITS encourages users to download the new spreadsheet version from the Georgia*FIRST* website here.

Reports/Queries	

Budget Transaction Review (BORRG011)	**Navigation: BOR Menus > BOR General Ledger > BOR GL Reports > Budget Transaction Review** A new column titled "Ref" was added to the Budget Transaction Review report. This column pulls data populated in the KK_BUDGET_LN table in the JRNL_LN_REF field.

Page Changes	

Department Manager Dashboard	**Navigation: People Tools > Security > User Profiles > Dashboard Department Security** The iStrategy Department Dashboard was renamed to Dashboard Department Security since iStrategy was decommissioned earlier this fiscal year. This page is used to set up a user's department security for dashboards. Updated job aids can be found on the Georgia*FIRST* website here.

Other Notes	
Next Scheduled Release	PeopleSoft Financials Release 5.54 is currently scheduled for Friday, March 20, 2020. Users will receive a reminder of when this update occurs.
More Information and Support	For business impact issues, contact the ITS Helpdesk at helpdesk@usg.edu or the Helpdesk website.