

PeopleSoft Financials Budget Prep – HCM Export & OneUSG BP Load June 6 and 7 Session Q&A

Q: We will not see the OneUSG Connect Budget Prep Audit Reports until we actually export the data from PeopleSoft Financials to HCM, right?

A: That is correct. You must complete the HCM Export in PeopleSoft Financials before you can run the Budget Prep Audit in OneUSG Connect

Q: Are “errors” hard stops that will keep the data in the staging tables from loading or are they just “warnings”? What happens if an error is not corrected?

A: The Budget Prep Audit Report will display both errors and warnings. Errors are hard stops that will prevent the staging tables from loading. Warnings are advisory and should be reviewed to determine whether or not action is needed. Review the Budget Prep Job Aid for more details. If errors are not corrected your budget will not load.

Q: Do we still need to delete the future-dated position rows to get the budget to load or can we proceed without deleting them if the future dated row is correct?

A: You can proceed if the future dated row is correct.

Q: It looks like the report being demonstrated lists errors that we don't have on our audit reports. Are they errors we should be looking for somewhere else?

A: No. Each institution will have different errors on their audit reports. If you do not see a particular error, that error does not exist for your institutions data.

Q: After we run the error report and work the errors, can we run the Audit Reports again to make sure they are cleared before loading the budget?

A: Yes, you may run the audit reports as many times as you wish. This is the best practice to ensure your data is clean and your budget will load successfully.

Q: Will future dated rows on job and position remain after budget prep is loaded?

A: Yes.

Q: Could you please explain how the "Skip" option on the positions in Budget Prep will be handled during the HCM import? Does it update funding?

A: 'Skip' flag only prevents the Compensation and Job rows from being updated. Position and Department Budget data will be updated even if the 'skip' flag is checked. It will update funding.

Q: What is the security role needed for OneUSG Budget Prep?

A: BOR Budget Prep Processing

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Q: How does the Budget Prep Timeline need to work with our Summer Faculty job rows?

A: You may go ahead and enter your summer faculty job rows using [Job Aid JA_HR013: Summer Faculty Hiring](#). Budget Prep will insert an RWB row on 8/1 using the appropriate effective dated sequence.

Q: My institution is consolidating. Are our budget prep dates the same as non-consolidating institutions?

A: Yes.

Q: Does budget prep create a job data row even if nothing has changed for is changed for that person?

A: Yes. A 7/1/2018 row will be inserted for all employees; Action = Position Update; Reason = New Fiscal Year

Q: Will budget prep insert rows on employees on LOA (leave of absence)?

A: Yes. Any employee with an active HR status will receive this row. This row will not change their payroll status (LOA, SWB, etc.). These rows will not be applied to any employee in an inactive HR status (Retirees, Terminations).

Q: Will that Job Data row for position update/NFY pass to Alight? If a raise was given in BP, will that load to a separate row?

A: Yes, the job data rows will be fed to Alight. If a compensation change was input into job data, it will add a new row on job data, updating compensation, and then also feed to Alight.

Q: What order does budget prep load?

A: Position, job, DBE

Q: We have positions that we do not load into BP. Will we will have to manually set all these up in the DBE for 2019?

A: Yes, those will be added manually.

Q: Does budget prep create departmental budget tables for non-benefitted employees like student assistants, etc.?

A: Yes, if the employees are paid.

Q: If we have future dated termination rows for students, should we delete them?

A: No, you may leave your future dated termination rows.

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Q: If we have, for example, and Reports to update with an effective date of 7/1/18, will the new row for the record come over since we can use sequences in HCM?

A: OneUSG Connect (HCM) does use effective dated sequences for job data. The new record will be added without issue. Position data does not currently use effective dated sequencing.

Q: How will the last bi-weekly payroll (June 17 to June 30) be paid on July 7th?

A: The payroll expense will post using the department budget table listing for FY18. Accruals and GL will also be for FY18.

Q: Do job rows inserted using budget prep update Absence Management information on the payroll tab of job data?

A:

Q: Do job rows inserted using budget prep update reports-to or Time Reporter data?

A: Job rows will update reports-to if the action = Position Update (POS) and reason = reports-to update (MGR)

Q: What happens if we do not load our budget by June 29th?

A: You will have to key all related position, job, and DBE data manually.

Q: Can we get the audit reports in an Excel format in addition to PDF?

A: This is something we are working on for a future release.