



## Bridges Advisory #33

October 29, 2004

The University of Florida is committed to a keeping you informed as we continue our transition to the new myUFL systems. For more information about the Bridges Advisories, or to read past issues, please visit [www.bridges.ufl.edu/advisory](http://www.bridges.ufl.edu/advisory).

**PLEASE READ THIS EMAIL (OR SHARE WITH THOSE WHO DO NOT HAVE A COMPUTER)  
EACH WEEK TO STAY INFORMED DURING THE TRANSITION.**

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**TUNING OF THE myUFL SYSTEMS.** We have PeopleSoft and IBM experts on-site at UF Bridges assisting us with tuning the myUFL systems so they run more efficiently. We are resolving technical issues that keep us from running as designed. Some processes that should run within minutes are running over several hours and must be tuned. The hardware purchased is more than sufficient for our needs. We anticipate much better performance for campus end users upon the completion of this work.

**DO YOU HAVE PROBLEMS YOU CAN'T RESOLVE AND DON'T KNOW WHOM TO CALL?** The university offers two programs specifically designed to help you solve problems and/or gain a better understanding of the myUFL systems—Bridges Liaisons/College Experts and Open Labs. If you have staff or colleagues who are frustrated or stymied by the myUFL systems or new business processes—please tell them about these two options. For matters concerning access to the portal, including password, browser or computer problems, the UF Help Desk remains the primary point of contact.

More importantly, if you have ideas about how these two programs can be improved or how we can increase participation, please send your suggestions to the myUFL Suggestion Box via the portal (in upper right-hand corner, below the Search myUFL box).

**1. College Experts/Bridges Liaisons** program is designed to help those departments or individuals that have unresolved issues regarding the myUFL systems. Each college and unit has identified their own “experts” for HR/Payroll and Financial systems and those individuals have received additional formal training. We ask that you “funnel” your questions to your college representative for two reasons: 1) they are helping UF’s Training and Development team identify additional training classes or materials that need to be developed and/or how they can be improved; and, 2) oftentimes they have dealt with the issue previously and know precisely how to resolve your problem or whom to call.

To find your college expert or Bridges liaison, click on Get Assistance on the Bridges Web site or [click here](http://www.bridges.ufl.edu/docs/Liaisons.pdf) <<http://www.bridges.ufl.edu/docs/Liaisons.pdf>>. The college expert will funnel any unresolved problems, concerns or suggestions to a designated Bridges Liaison. The liaison is responsible for personally making sure that the issue is resolved and following up directly with the college expert or the specific individual or department involved.

If you are not satisfied with the service provided by your College Expert or Bridges Liaison, please send us a note via the myUFL Suggestion Box or contact the UF Help Desk to open a formal ticket. The university is very committed to this program and encouraged by the numerous departments who are effectively using it to resolve their issues.

**2. Bridges Open Labs** are three-hour unstructured sessions based on a specific functional area (e.g., Purchase Orders, Travel, eRecruit, Reporting) that are staffed by knowledge experts. Participants may drop by at any time during this three-hour period. Typically, each session includes the UF Bridges project team leader or member and a business process or knowledge expert from a core or central office. In addition, because it is housed at the Bridges offices, we are able to pull in additional resources to resolve or explain any technical or security-related issues.

Formal training is not required but participants should at least be familiar with the system and have the appropriate user security role to access the system. At these sessions, you will be logging on just as you would at your office but with the experts by your side to help you. Bring your work and we will help you get it done. Bring your work problems and we will help you solve them.

Open Lab sessions are designed for anyone—faculty, students or staff—who need help with using the myUFL systems or learning the new business processes.

Sessions are scheduled through November 29 and more will be added if there is enough demand. All sessions are held at the UF Bridges offices in Union Street Station, Dodge Island training room, Suite 211. Free parking is available in the parking garage to the northeast of Union Street Station. Please bring your parking ticket for validation.

Next week's sessions include:

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|---|--------------------------------|
| • Monday, November 1, 8:30 am – 11:30 am    | Time and Labor/Payroll         |
| • Monday, November 1, 1:30 pm – 4:30 pm     | PCard                          |
| • Tuesday, November 2, 8:30 am – 11:30 am   | Travel                         |
| • Tuesday, November 2, 1:30 pm – 4:30 pm    | Budget/Spending                |
| • Wednesday, November 3, 8:30 am – 11:30 am | Time and Labor                 |
| • Wednesday, November 3, 1:30 pm – 4:30 pm  | Grants Pre-Award               |
| • Thursday, November 4, 8:30 am – 11:30 am  | Security/Access Request System |
| • Thursday, November 4, 1:30 pm – 4:30 pm   | Vouchers                       |
| • Friday, November 5, 8:30 am – 11:30 am    | Projects - Housing             |
| • Friday, November 5, 1:30 pm – 4:30 pm     | Reporting                      |

**PURCHASE ORDER CHANGE REQUEST FORMS AS A TEMPORARY SOLUTION.** The PO Change Request in myUFL is still undergoing development and testing. As a temporary solution a change order form can be used to make changes to POs. The [PO Change Request form](#) is available from the [F&A Forms](#) Web site <http://fa.ufl.edu/forms/>, the [Purchasing forms](#) Web site [http://www.purchasing.ufl.edu/main\\_forms.asp](http://www.purchasing.ufl.edu/main_forms.asp), and the Bridges Web site under Resources > Purchasing.

The change order form is designed to mirror the functionality that the myUFL change order process provides, so it differs from the SAMAS/FLAIR change order form.

- What you *can* change:  
Quantity, unit price, due date and ship-to location
- What you *cannot* change:  
Vendor and ChartField
  - To change the vendor, cancel the PO and create a new requisition.
  - To change a ChartField, change it on the voucher.

You also cannot:

Add lines to existing purchase orders (but you can increase existing lines)  
Make changes to purchase orders generated using the “Search Catalog” feature.

**IMPORTANT:** Unlike FLAIR you won't need to close a PO to release the remaining balance after payments have been made. You cannot cancel a purchase order which has had a voucher paid against it. To release the remaining encumbered funds "finalize" the last encumbered voucher paid and then budget check the voucher.

The form can be mailed or faxed to Purchasing or emailed to [purchasing@ufl.edu](mailto:purchasing@ufl.edu). To avoid duplicate entry, please do not email and/or fax and then send the original.

**eRECRUIT FOR FACULTY POSITIONS.** Please review today's [DDD memo](#) from Provost Colburn regarding the use of eRecruit for faculty position recruiting. Departments and colleges are to continue with eRecruit for staff positions and for posting vacant faculty position announcements. Faculty job candidates should be asked to submit their applications and supporting documents electronically and through the mail, but not through eRecruit. Applicant data cards may be submitted electronically, using the following link: <http://www.hr.ufl.edu/job/datacard.htm>, or through the mail as advised previously. Be mindful that faculty search and hire procedures will not be considered completed until departments submit their Equity Compliance Report to Dr. Debra King's office. This report form is available by request through that office or online at <http://www.aa.ufl.edu/aa\affact\index.htm>.

**TIME REPORTING CODES ADDED TO NEW PAYROLL SITE.** A current list of [Time Reporting Codes](#) (TRCs) has been added to the Bridges Web site under Services > Payroll and Resources > Payroll.

**NEW TRAINING MATERIALS.** The following training class materials have been updated this week. Class presentations and handouts are located on the Bridges Web Site under Get Trained > Classroom Presentation and Handouts.

#### Human Resources Management System

- Time and Labor I: Managing Exceptions and Approving Time (replaces "Time and Labor Approval" class)
- Time and Labor II: Advanced Features (replaces "Time and Labor Administration" class)
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The following two sessions replace the "Posting a Position and Hiring via eRecruit" class.

- eRecruit I: Posting a Position and Identifying a Hire
- eRecruit II: Completing Hires in PeopleSoft

**NEW INSTRUCTION GUIDES.** The following Instruction Guides have been updated or added this week. Guides are located in the portal under the Help folder or on the Bridges Web Site under Get Trained > Instruction Guides.

#### Customer Relations

- Deposit Transmittal Form (Updated)

#### Hiring > Staff, OPS, and Student Positions

- Preparing to Complete a Hire (Updated)

**CAN'T REMEMBER WHICH ADVISORY CONTAINED THE INFORMATION YOU NEED?** The Bridges Web site has a search box in the upper right-hand corner that can be used to locate items in past Bridges Advisories. In the box, type "Bridges Advisory" and then a key word or a string of words in quotes if you are looking for an exact phrase. For example, typing "Bridges Advisory" and "travel" will bring up many "hits." The more specific your phrases or number of words, the more relevant the documents but also the greater risk of missing relevant material. For example, travel and expense may not return as many advisory listings as will travel). You may note that other references to your subject will appear from other locations on the Web site (e.g., Frequently Asked Questions), but the Advisory references will be listed first.

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- For frequent updates about the project, subscribe to the UF Bridges pagelet on the [myUFL portal](http://my.ufl.edu) <<http://my.ufl.edu>>. For a quick tutorial on how to use myUFL, visit: <http://wla.erp.ufl.edu/media/PersonalizeContentLayout.html>.
- For more information about the transition, visit the [Bridges Web site](http://www.bridges.ufl.edu) <<http://www.bridges.ufl.edu>>.
- For help or support in using the new systems, including the portal, contact the UF Help Desk at 392-HELP or [helpdesk@ufl.edu](mailto:helpdesk@ufl.edu).