



Bridges Advisory #47

February 11, 2005

The University of Florida is committed to 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.

**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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ENTERPRISE REPORTING UPGRADE THIS WEEKEND. An upgrade to the newest version of Cognos will be conducted this weekend. Enterprise Reporting will be unavailable Friday evening between 5:15 pm through Saturday night. There is a possibility work will need to continue on Sunday. Users will see the Scheduled Maintenance page if they try to use Enterprise Reporting while the upgrade is in progress. Once the work is done and the system is tested, the Scheduled Maintenance page will be removed.

The upgrade will result in several enhancements to Enterprise Reporting. While it will have a slightly different look and feel, the basic navigation and folder structure (including the reports in each folder) will remain largely unchanged.

One key change is report consolidation for paylists and cost distribution reports. (Note: Report consolidation for other areas will occur over time.) You'll notice fewer clicks between you and the information you want.

Another new feature is the automated processing of standard reports for the current pay cycle (i.e., paylists and cost distributions). These "delivered" reports are reports that payroll processors typically run at the end of the pay period, but will now be automatically run for you and put in a "Delivered Reports" folder in Enterprise Reporting for you to pick up. Bridges Reporting team is working to create additional delivered reports for other functional areas (e.g., leave, ledgers, etc.).

Improvements have been made to the Summary Ledger cubes to allow users to drill through from the detail ledgers to the data in the actual subsidiary or sub-ledgers (i.e., Purchase Order, Accounts Payable, Expense) in which the transaction took place. This enhancement is a result of feedback from campus and will be extremely helpful to those who reconcile retroactive distributions or "retros." Those working with grants will welcome the ability to search for projects by Researcher or Department in addition to the current method of searching on Project Number.

As a result, any saved views that are based on the current Summary Ledger cubes will no longer work after this weekend's upgrade. You will need to resave your view next time you use the new ledger cube.

Two other changes will be minor but have an impact on your saved work. First, the Personal NewsBox will be replaced with My Folders. My Folders operates similar to the Personal NewsBox in that you can save your ad hoc queries or report views for later use. Second, those who use Cognos Query for ad hoc reports will now be using a similar product by Cognos called Query Studio. As a result, the queries built with Cognos Query will no longer work. Users who have work saved in their personal folder have been notified of these changes and their impact.

New instruction guides have been developed to help you with the transition to the new Enterprise Reporting tools and reports. They will be posted by Monday morning on the Bridges Web site > Services > Enterprise Reporting.

PORTAL UPGRADE ON SATURDAY, FEBRUARY 12 BETWEEN 3:00 AM and 8:00 AM. The myUFL portal will be upgraded to PeopleTools 8.45 this Saturday, February 12. Users may not be able to access at times during the portal during the Saturday maintenance window – 3:00 am to 8:00 am. There are few changes being made that are visible to end users but they will improve the performance of the portal and all myUFL systems.

The portal [browser requirements](#) have changed to reflect that the Apple Safari browser is now supported. In short, this means if an end user reports a problem in myUFL using a Mac OS X with Apple Safari 1.2 browser, Bridges can now submit a request for PeopleSoft to fix the problem. In addition, the requirements now provide recommended hardware and software for different types of portal users (i.e., power user vs. casual user). The other major portal enhancement as a result of this upgrade is improved calendar functionality for portal authors and publishers.

NEW SECURITY EXCHANGE FOR DEPARTMENT SECURITY ADMINISTRATORS. Last week Bridges added the newest Exchange in myUFL. Department Security Administrators will see the Security Exchange when they navigate to the Access Request System > Requests > Manage Requests link in myUFL. The Exchange will appear at the top of the myUFL Menu. Like the other Exchanges for Time and Labor, Travel and Grants, the Security Exchange consists of:

- A moderated discussion forum;
- Information (e.g., www.bridges.ufl.edu/security);
- Articles written by representatives of the Bridges Security Team.

The purpose of the exchange is to share information. Individual security problems still need to be reported to the UF Help Desk.

BIWEEKLY RETROACTIVE DISTRIBUTIONS SCHEDULE. To make sure retroactive distributions (commonly known as retros) are available every two weeks, Bridges has set up the following schedule for payday weeks:

- Wednesday – run retros in HRMS system.
- Thursday, Friday and Saturday – run all Finance processes that involve retros.
- Sunday at noon – update data warehouse in Enterprise Reporting.
- Monday at 8:00 am – reports are available in Enterprise Reporting.

MORE ENHANCEMENTS MADE TO myUFL SYSTEMS LAST WEEK. This past weekend Bridges implemented numerous improvements to the myUFL systems. Most of the changes are not visible to end users. The upgrade did fix several specific problems as well as improved general system performance. Bridges applied 17 “fixes” or enhancements in Accounts Payable, Accounts Receivable, Billing, Commitment Accounting, General Ledger, Purchasing and Payables, Benefits, Time and Labor, Payroll, and Security.

In addition to “inactivate” enhancement made to the Payroll Distributions system (described in Bridges Advisory #46), we also made an enhancement to the Purchasing system. Those with UF_PO_Initiator now have the ability to delete templates no longer needed. The button has always been displayed but was not ‘turned on’ until this weekend’s upgrade.

DOUBLE DEDUCTIONS BEGIN FOR 9- AND 10-MONTH ACADEMIC PERSONNEL. To ensure continued coverage for health, state life, optional and supplemental insurances during the summer, 9- and 10-month academic personnel will have double deductions taken from their paychecks beginning with the February 4 paycheck and continuing through May 13. Normal payroll deductions will resume on September 2.

Academic Personnel whose pay will be interrupted during this period or who will terminate employment at the end of the spring semester should contact University Benefits at 392-1225 (SC 622-1225) or benefits@ufl.edu.

SOME CHANGES TO W-4s MAY BE MADE ON-LINE IN myUFL. To change your W-4 information via the UF portal <http://my.ufl.edu>, follow this navigation: My Self Service > Payroll and Compensation > W-4 Tax Information. Employees may make changes on-line to the following items:

- The number of allowances being claimed
- Additional amount of money to be withheld
- Marital status
- Exemption status

Changes to these items may be submitted at any time and become effective immediately upon clicking the "Submit" button.

Paper versions of the W-4 still must be submitted for changes to address and name. A copy of the employee's Social Security card with the new name must accompany the W-4 card and be sent to Employment and Classification, PO Box 115002, Gainesville, FL 32611 or faxed to (352) 392-7094.

Questions? Please contact Employment and Classification at (352) 392-4621 (SC 622-4621) or employment@ufl.edu.

TIPS FOR LEVEL 1 APPROVERS: PAST EFFECTIVE DATES AND RECYCLING. Level 1 approvers should not use the recycle function for job or position actions that need to be corrected but that have an effective date prior to the date of review. Neither the originator nor Level 1 approver can make changes to items with a past effective date. *Example: A hire is effective February 4, but the action was entered into workflow on February 6 and is therefore being reviewed by Level 1 after the effective date.*

For actions with past effective dates with items requiring correction, Level 1 approvers should use one of the following options:

1) Approve the action (with the past date and error) into workflow and include a note in the "More Information" box that tells the Level 2 approver what needs to be changed. Level 2 will make the correction when reviewing and approving the action.

2) Deny the action and make a note in the "More Information" box for the department to read so they know what the error was. The department will ultimately have to re-enter the entire action into PeopleSoft, but before it can do so, the appropriate core office (Level 2) needs to be contacted so that the inaccurate job or position row can be deleted. (Note: Denying an action does not automatically delete the incorrect row).

Please contact Employment and Classification at (352) 392-4621 (SC 622-4621) with questions regarding TEAMS, USPS, and non-faculty OPS employees.

NEW INSTRUCTION GUIDES. Some new or updated instruction guides are available on the following Services pages:

- Hiring and Job Actions: UF Faculty Compliance (New)
- Hiring and Job Actions: Reviewing Online Resumes, Interviewing Candidates, and Making a Job Offer (Updated; formerly called “Preparing to Complete a Hire”)
- Payroll: Payroll Distributions (Updated)
- Payroll: Additional Pay (Updated)
- Payroll: Providing Additional Pay for Someone Not in Your Department (Updated)
- Time and Labor: Using Time Reporting Codes (Updated)
- Time and Labor: Tips for Approving Time and Leave (New)

NEW RESOURCES. Some new or updated resources are available on the following Services pages:

- Enterprise Reporting or Security: Reporting Roles for End Users (Updated)
- Enterprise Reporting or Security: Reporting Roles for Core Users (Updated)
- General Ledger and Budgets: ChartFields Request Form (Updated)
- General Ledger and Budgets: Department IDs as of February 4, 2005
- Travel and Expense: Expense Workflow (Updated)
- Travel and Expense: Travel Authorization Workflow (Updated)
- Travel and Expense: University of Florida Travel Policy (New)

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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, please sign on to the portal and click on Help > How to Use myUFL.
- For more information about myUFL systems, 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.