

## FIN 8: Now What?

*You've had about a month to work in the new Finance System – the web-based FIN8. So how is it going? Where have you needed help? What questions do we hear most often?*

Departments are now in their fifth week of daily activities in the upgraded financial database and judging from most of the feedback we've received, you are doing very well indeed.

### ***Congratulations to CU Department Staff!***

Your successful switch to the new database is not only a tribute to the design and functionality of the system itself; it is very notably a tribute to your own conscientious preparations. *You* participated in campus demos, *you* completed your online training courses, *you* printed the Step by Step Guides for easy reference, *you* called the appropriate offices for help when you needed it, and *you* recognized – and welcomed – the enhancements offered by the new system.

Throughout the past five weeks, the Procurement Service Center Help Desk has heard from many of you as you work in FIN8. We have seen some trends, both in *your* questions on technical or procedural issues and in *our* questions to you as we strive to assist you. Now we would like to take the opportunity to share some of these common questions with all of you and to review where we stand on the procurement side of the finance upgrade.

### **What are we most often asking YOU?**

- *Where are you?* You can't find the application you need. Are you using a computer with a University IP address? Did you login to FIN Production or FIN Reporting? Or did you go somewhere else?
- *What is your software?* Something "doesn't work." Tell us which Internet browser (and which version) you are using. Tell us which version of Adobe Acrobat you have installed. Also, do you have popup blockers? (If you do, you will need to turn them off for the Finance web site.)
- *Do you know your keyboard?* When print and dispatch processes cause trouble, you may just need to hold down your CTRL key as you click those icons. (On a Mac, try holding down your apple key.)
- *Have you set your Purchasing Defaults?* We don't want you to work harder than you have to work. Setting your defaults in FIN8 saves you time and effort by reducing data entry on every new DPO, PO Requisition, and SPO Requisition. See our Step by Step Guide to Setting Purchasing Defaults...or call the PSC Help Desk at 303.724.4772 for assistance.
- *Are you asking for a new SPO, or for the renewal of an existing SPO?* In both cases, you begin on the SPO Requisitions-Add page. What you do next depends on the situation. For a new SPO, fill in the blank fields. For renewal of an existing SPO, click the green renewal icon in the upper right corner of the page and then make changes as needed.
- *Did anyone run budget check?* POs do not require a separate budget check step: instead, this happens automatically with the approval. Both PO and SPO Requisitions, however, do require budget check as a separate step: this can be done by the req approver after approving, or it can be done by the req initiator after the requisition has been approved.

### **What are you most often asking US?**

- *You want help with printing.* Most of the printing difficulties we've seen are related to one or more of the following:
  - you do not have a current-enough version (6/higher) of Adobe Acrobat installed;
  - you have multiple versions of Adobe installed...so the print process fails since it defaults to the lowest version;
  - you are not using Internet Explorer (version 6/higher) as your web browser; *and/or*,
  - you have turned on popup blockers...so you need to allow popups from the FIN8 web site and/or hold down the CTRL key when printing or dispatching.
- *You want the Step by Step Guides.* You'll find instructions for using Finance, Procurement, and HR components on the CU Business Applications web page at <https://saturn.cusys.edu/>.
- *You wonder if your access has changed.* Most FIN8 users retain the same security authorizations they had in Citrix. A few system changes prompt questions on security access.
  - Previously, you did not need database access to request new or renewed Standing Purchase Orders (SPOs) since this process was accomplished through the SPO Request form on the PSC web site. Now, you need security authorization to create online Requisitions.
  - Previously, if you approved Purchase Orders or Requisitions online, you could also update them. Now, you can not change Reqs or change/dispatch POs unless you have the specific create/update security access. Approver access allows you only to approve.
  - Previously, you could produce formal PO printouts even for POs that you did not yourself create (e.g., high-dollar POs). Now, if you can not (or do not) use the Dispatch button to print the PO, the printout will be labeled **Unauthorized**, indicating that it is for internal use only. When you need to produce a formal external document for a vendor, be sure to use the Dispatch process.

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**Editor:** Normandy Roden  
(303) 724-0675  
[normandy.roden@uchsc.edu](mailto:normandy.roden@uchsc.edu)

