Published on *University of Colorado* (https://www.cu.edu)

Elevate: FIN Upgrade – What's Happening? A Recap through 2/2/15 [1]

February 8, 2015 by normandy.roden [2]

We have had a very eventful January and we're excited to bring you all on board with Elevate: FIN Upgrade developments. Our recap blog post this time around is a little longer than usual … but we think you'll want to hear it all!

Recent recap:

- Campus engagement. A member of our FIN 9.2 team will be on your campus at least twice a month from now on! We're doing this to promote drop-in questions, facilitate meetings, encourage sharing, and so forth. We'll talk more about this in the near future, but in the meantime: if you have a specific need or interest, let us know [3].
- Testing. This is such a critical part of the project! We need to verify that the system is working the way you need it to. We're working with some great volunteers (thanks, all of you!).
- Projects CU will be going away. But don't worry: in FIN 9.2, it will be merged into delivered PeopleSoft Project Costing and Grants. This module is used by Grants but is for *so much more* than Grants – like capital asset tracking, management of costs for projects that may not be sponsored projects, additional reporting that captures needs not found in the General Ledger, and so forth. The module gives departments significant new functionality that has previously only been accommodated through external systems. We've started our deep dives in this area and are getting great feedback. (Thank you!)
- Grants/Post Award. This is a new set of modules to help with CU's post-award accounting needs. As you know, the PeopleSoft Finance System is our official record for all things related to accounting, and the Grants/Post Award module helps serve this need by giving users (department PIs and accountants) the ability to see a full 360° view of the grant award ... as well as each individual project that is associated with the grant! (Another plus: we've moved the cost-share program into the actual project – so that 360° view includes breakdowns of cost-share vs. sponsor-reimbursable!)
- Cash Management is another new module. It will streamline our banking needs and automate our banking accounting entries. We've started working with Treasury and will soon be reaching out to the campus bursar's offices to talk about what this module can do for *you*.

- Mini Deep Dives. Have you been to one yet? These working sessions are geared to preliminary decision-making, helping us complete our configurations for workflow, work centers, dashboards, reports, and so forth.

- Data Conversion continues. This is another big, behind-the-scenes task for the FIN Upgrade. You're going to hear a LOT more about this in the coming months

- FIN Training is in development. We love training because we know how important it is to help you feel comfortable and supported during times of change. We think you're going to love it, too, as we deliver training for the core testing team and as we roll out end-user training for User Acceptance Training (UAT) in late summer.

What else? That's up to you.

We can't state this enough: your input is INVALUABLE. Please be sure to send any feedback or suggestions you have. Use our handy feedback form [4]!

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