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Elevate: FIN Upgrade – What's Happening? A Recap through 3/5/15 [1]

March 22, 2015 by normandy.roden [2]

We have some great developments to share with you regarding the Elevate: FIN Upgrade project. So let's get up-to-date with the major happenings of the past month ...

Our popular on-campus Deep Dives [3] and Mini Deep Dives [4] are wrapping up in March. They've been such a success that we were asked to talk about them at the 2015 Alliance Conference [5]. (Alliance is sponsored by the Higher Education User Group, or HEUG, an international organization consisting of higher ed institutions that use application software from the Oracle Corporation.) We'll tell you more about our Alliance sessions later in March.

New, and now underway, are our Working Sessions. These are small-group interactions designed to ensure that the FIN 9.2 configuration and processes function as needed; they provide the upgrade team with decision-making results and testing help. Working Sessions focus on key topics like PeopleSoft reporting solutions; the Project Costing module and potential uses for CU; workflow design; and, F&A in sponsored projects. They'll run from March through May/early June – look for them on our project calendar [6].

- Yes – we now have a calendar of FIN 9.2 happenings (regularly updated) on our Elevate: FIN Upgrade website … check it out [7] and check it often!

SharePoint [8] is being upgraded from 2007 to 2013 this month. This means that you'll be able to access files using your campus log-in credentials. We'll let you know when this goes into effect.

And – here's a major development in ODBC (Open Database Connectivity): No loss of CIW/ODBC access when we go live with FIN 9.2 in November 2015! This means that your external queries (e.g., using Microsoft Access) will still work despite database changes. We'll be testing CIW data this summer to support this commitment.

Post-Award Accounting Cross-Campus Meetings have been underway for some time now, with biweekly discussions on the different ways that the campuses manage post-award accounting for sponsored projects. These meetings are not specific to PeopleSoft, although we do talk about that functionality when the agenda warrants it.

Testing Kickoff took place earlier this month with a large audience. Part of the exercise with the testing coordinators was to create workbooks of testing scenarios that would be used as a basis to start campus FIN testing. We are wrapping up some final configuration and then will start emailing the testing coordinators about what is ready and how to test it.

Data Conversion continues for many aspects of our project. We provided initial data maps last

fall of how data in 8.4 maps to data in 9.2. We plan to have these maps finalized after we get through our first set of testing with campuses. We have also started preliminary reconciliation activities with our student workers.

Training related to FIN is being planned and developed. As mentioned earlier, we will deliver training for the core team as we start to roll out new functionality for testing. In addition, the OUC finance training team is working on end-user training for the User Acceptance Training (UAT) in late summer.

Questions? Ideas? General feedback? Talk to us. We need your input to make sure we're not missing anything. Remember: FIN 9.2 is your system and these are your business processes. Use our handy feedback form [9]! We look forward to hearing from you.

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The FinPro Help Desk is tweeting about Elevate: FIN. Follow them at https://twitter.com/FinProHelp [10]

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Give Us Feedback

Help us improve your business processes as we upgrade our PeopleSoft Finance System. Give us some feedback [12].

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