Elevate: FIN Upgrade - March Discussion with the Financials Advisory Board [1]

March 22, 2015 by normandy.roden [2]

The PeopleSoft FIN 9.2 Financials Advisory Board (FAB) met on March 3, 2015 to discuss project status and share updates.

FIN Upgrade Project Lead Vickie Martin noted that the project status is good, with ongoing positive feedback on the extensive campus involvement to date. Together, we are focusing on functionality, as opposed to merely de-customization.

Deep Dive-type sessions are wrapping up and Working Sessions on General Ledger (GL), ChartFields, Projects, and other topics are underway. The launch of Working Sessions continues our trend of partnering with campus representatives. These sessions are designed to give users input into workflow design, dashboards, projects, reporting, and other areas. We know how busy you are at fiscal year-end so we'll strive to get all Working Sessions scheduled before then.

Two big updates are related to SharePoint and ODBC (Open Database Connectivity). First: Good news that we will be transitioning to SharePoint 2013 this month and thereby simplifying campus access to the extensive FIN 9.2 files [3] housed in SharePoint. Second: More welcome news in that there will be no loss of CIW/ODBC access when we go live with FIN 9.2 in November 2015.

In the area of data conversion, the upgrade team is working on: Project CU to Grants/Project Cost; AP Trials; HCM Accounts; and, Cost Share Program to Projects. Overall, data conversion involves all data in FIN (including historical data), HCM payroll data, and the CIW. As a reminder: FIN 9.2 will rely on new Business Units and Set IDs, so when you pull data from the new system, you will need to specify accordingly.

FAB members reviewed two new resources available in SharePoint – a high-level calendar tracking overall progress of the upgrade, and a daily calendar providing detailed information regarding the activities of the project team. The latter has been posted to the Elevate: FIN Upgrade website [4] and will be updated regularly.

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Learn about the upcoming Finance System upgrade. <u>Visit the Elevate: FIN Upgrade website</u> [6].

Give Us Feedback

Help us improve your business processes as we upgrade our PeopleSoft Finance System. <u>Give us some feedback</u> [7].

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