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Elevate: FIN Upgrade - Weekly Recap, January 8 [1]

January 8, 2016 by normandy.roden [2]

How is the upgraded Finance System working, one month after go-live?

It's been four weeks since our December 10 transition to FIN 9.2. So it's a good time to do two important things: (1) Send out a big THANK YOU to the hundreds of dedicated users who have generously given their time and expertise to help make this system work for all of CU. (2) Start sharing regular updates on what's working -- and what's not -- in FIN 9.2. Here is the first in a series of weekly recap/review summaries.

Workflow and Worklists

- With the exception of some sponsored project routing, **workflow** is functioning as set up by the different campuses. At campus request, we've turned off workflow email notification until everyone feels comfortable with the new processing. Also at campus request, when we turn the emails back on, we'll create a video tutorial on how to control your inbox by writing rules in Outlook.
- **Worklists** are also functioning as they should. However, many users are trying to access FIN data by clicking the Worklist link in the CU Resources tab of their portal. Instead, be sure to go to the Finance System and click the Worklist link there.

Cash balance lines

- We're replacing our old, customized cash line generation process with PeopleSoft's delivered functionality to create the cash lines behind your transactions. We'll finalize the new process – known as **cash balancing by ChartField** – later this month. (Currently, our OUC Finance team is manually generating all cash lines!)

Sponsored projects

This is a big area of change and we have several issues to report.

- A small number of projects – about 1,000 out of 55,000 -- are still being **loaded.** (If you need to work with one of these projects, contact FinProHelp to prioritize its processing.)
- Sponsored project **budgets** entered in FIN 9.2 are not feeding automatically yet. (We're manually processing for now.)
- There have been some errors **applying cash received** to sponsored projects. (We're aware of this and working on it.)
- We haven't been running **F&A** due to ongoing data conversion and validation. (We'll

start running F&A the week of Jan 11.)

Query

- A number of security issues made it difficult or impossible for users to **run queries** during the first couple weeks after FIN 9.2 go-live. We're happy to report that on a system-wide scale, these are resolved. If you're having trouble with one of your queries, first, be sure that you've updated the query to handle the new table structure in FIN 9.2. If you're still having problems, email FIN Project Lead Vickie Martin [3]directly and she'll help you out.

Employee reimbursements without email notifications

- We all appreciate the email message that tells us when the PSC has processed our reimbursement request. Unfortunately, those emails have not been going out since FIN 9.2 go-live. We're working to restore the **ACH Deposit notices.** In the interim, we are sorry for the inconvenience.

Stay up-to-date

So here you have our current top FIN Upgrade issues. We'll also post them to the main Elevate Issues list. [4]

For a run-down on all of the FIN 9.2 issues we're addressing now, please check out the FIN 9.2 Answer Board [5]. Note that the Answer Board also includes responses to your frequently asked FIN 9.2 questions.

If you have additional questions, feel free to contact the Finance & Procurement Help Desk at FinProHelp@cu.edu [6] or 303.837.2161.

We look forward to hearing from you.

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