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FIN 9.2 Updates: FIN Security Roles, PS Query, Payroll Reports, and July Close [1]

July 15, 2016 by normandy.roden [2]

Among our topics of discussion this week are an enhancement to view security roles in FIN, a workaround to export PS Query to Excel, a modification to m-Fin payroll reports, and the dates for July month-end close.

All FIN users can now view security roles for themselves and others.

If you have FIN Inquiry access, you can now look up user roles by navigating to **PeopleTools > Security > User Profiles > User Profiles**. (You may want to set this as a Favorite!) Search by *Description* to look up by last name instead of by user ID. If your search results show multiple PeopleSoft user IDs for the person you want, be sure to pick the 10-character ID. For someone with the last name of Smith, it will look like this: SMIT000121.

One of the most common reasons to look up a user's roles is that your new employee needs access to FIN 9.2 and you want her to have the same access as another employee – but you don't know what to ask for. Looking up the latter employee's roles tells you which roles you should request for the new person.

- Using the above navigation, go to the Roles tab in the User Profiles screens. If there are more than 10 roles indicated, click the **ViewAll** icon above the list of roles to see all of them.
- Don't worry about the roles that are marked as *Dynamic* (these are typically at the bottom of the list). Dynamic roles are automatically assigned based on the requested roles.

Questions? Contact your Campus FIN Security Coordinator. [3]We'll publish more detailed instructions on how to look up user roles next week.

If you want to export a PS Query and the Excel download link is not active, here's a way to fix it.

If you're ready to export your Query to Excel … and you can't, because the link doesn't work … here's why, and here's what to do about it.

This situation happens when you log out (or were kicked out) of FIN and you simply logged right back in through the portal. Ordinarily, this wouldn't be a problem, but this approach is currently interfering with the export to Excel.

So what you need to do, instead, is completely close your current browser session. Then, open a new browser session, log back in to the portal, go to FIN, and you'll be fine. The Excel

download link will be enabled.

We're working with Oracle for a resolution. In the meantime, this workaround lets you get your work done.

You can now run m-Fin payroll reports for period 996.

If you have PETs in period 996 (the adjustment period between first and second close), you'll be able to see them now on your m-Fin COMPENSATION SUMMARY and m-Fin PAYROLL TRANSACTIONS reports. These reports also now support period 997 (the adjustment period between second and third close).

Campus *month-end close* for July is currently planned for Tuesday, August 9.

Our current plan is to set the close dates for **July** (FY 2017 period 1) one week later than usual. This means campus close would be Tuesday, August 9, and system close would be Wednesday, August 10, 2016. We'll confirm these dates later this month.

Continue to let us know your questions and observations!

Contact FinProHelp@cu.edu [4].

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