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FIN and Grants Campus Update - January 2017 [1]

January 20, 2017 by normandy.roden [2]

For those of you who work in the Finance System – or rely on others who do – the following update continues our series of status reports on FIN and Grants.

FIN: recent updates to facilitate work process/flow

In January, the campuses and the OUC Finance team completed their testing on several updates. We migrated these to the production Finance System on January 12.

- **Journal Edit for Cash Transfers.** We've restored a customized process to edit cash transfer journals according to the Fund Transfer Rules table [3]. (In fact, the new FIN 9.2 process offers improvements over the old FIN 8.4 version, including the ability to enter more than one pair of cash transfer lines.) If you create Cash Transfer Journal Entries, please check out our new online resource page [4] for this process.
- **Journal Edit for Interdepartmental (ID) Accounts.** We've also restored a customized process to edit journals using ID Accounts so that these lines balance. If you have questions about using ID Accounts, please contact your campus controller's office.
- **Attributes now hyperlinked from ChartField values.** We've made Attribute information – for Accounts, Projects, and Programs – available from each ChartField value page via hyperlink. For example, now when you navigate to look up an Account, you'll see that the word Attributes on the Account page is blue, indicating it's linked. Click on the link to open a window that lists all Attributes for that particular Account ChartField. (Previously, department staff had to run queries in FIN 9.2 to ascertain the Attributes for a specific ChartField value.)

Grants: design sessions are promoting progress

The campus/System teams and consultants continue to dedicate a lot of time and effort to the Grants module.

- Work continues in the areas of data clean-up and billing, and in refining business processes and flow.
- Team members are continuing to make progress in design sessions. These focus on topics such as close-out, setting up projects/SpeedTypes, re-orgs, and exception reports.

What does this mean for you?

If you're a general user of FIN – You'll see some improvements to FIN processes.

- When you run Edit Check on your Cash Transfer or ID Account journals, you'll find out if they follow the rules. This means less time/manual review.

- When you want to find out the Attributes for an Account/Project/Program – is an Account AP Allowable? what is the Expense Purpose Code of a Program or Project? – you can look up that information directly in the ChartField inquiry (Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > ChartField Values).

If you're a specialized user of the Grants module, or a PI or department administrator involved with sponsored research – Continue to keep in mind that the Grants processes and process flow are still not at normal, but progress is being made and the campuses are paying close attention to your sponsors' needs.

Looking for instructions?

We've gotten great feedback on our How-To videos and procedures. See for yourself! [5]

And be sure to let us know if there's something you think would make a great video topic! Contact FinProHelp@cu.edu [6].

Do you have questions or concerns?

Please let us know. Contact FinProHelp@cu.edu [7] or your campus controller's office.

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