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New FIN 9.2 Features* [1]

What is FIN 9.2?

The upgraded version of our PeopleSoft Finance System, FIN 9.2, offers exciting new features and functionality.

To learn about these changes, watch the videos and read the descriptions below .



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Watch What to Expect with FIN 9.2 [2]


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Watch Feature Highlight: Attachments [3]



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Watch Feature Highlight: Menu Search [4]

Modules

This is not a new topic, but one you'll want to understand before go-live. In FIN 9.2, we will have access to a number of modules. Modules are essentially packages of update and inquiry transactions. The General Ledger module, for example, is a set of transactions for looking up, creating, copying, and approving journals, among other things. Accounts Receivable, Billing, and Asset Management are other examples of FIN 9.2 modules. We will also have the Contracts, Grants, and Projects modules that make up the Grants Management suite.

WorkCenters

WorkCenters are organized by module (see above). The WorkCenter feature consolidates select information and capabilities and presents it all in logical ways so that you can complete relevant tasks more easily and more quickly. The WorkCenter comprises:

- **The Dashboard:** a graphical display of real-time financial information related to the specific module. There is a default dashboard for each WorkCenter; you can modify the default display to suit your needs and preferences.
- **The My Work section:** lists of current things for you to take action on. These lists may be called **Current Work** or **Alerts.** For example, perhaps you have journals that are ready for processing, or worksheets to be posted.
- **The Links section:** a collection of pre-built “favorites” that let you navigate quickly to the update/inquiry transactions you need for common tasks. For example, you have a link to the Create/Update Journals transaction and to the Copy Journals transaction in the General Ledger WorkCenter.
- **The Reports/Queries section:** a separate tab that gives you access to relevant PeopleSoft-delivered reports and public queries, as well as to processes. For example, you can quickly run a journal entry print report.

Worklist

The Worklist is available from each WorkCenter – as well as from the FIN 9.2 home page. It pulls together into a single place all the items – from all modules – that need your approval.

In FIN 9.2, we will be able to take advantage of **approval workflow processing**. Your worklist makes it easy for you to see that you need to approve a gift journal or approve a small-dollar write-off.

Dashboards

Dashboards provide visually-friendly displays of relevant information. There is a default dashboard for each WorkCenter; you can modify the default display to suit your needs and preferences.

What else is new?

Invoices

For invoices, you'll find a WorkCenter with links to common tasks, alerts to action items of invoices not finalized, total invoices by customer or sponsor, and configurable pivot grids to highlight invoice information important to you. The WorkCenter is divided into four pagelets – My Work, My Links, Queries and Reports and Processes.

Accounts Receivable

For accounts received, you'll find a WorkCenter with links to common tasks, alerts to overdue invoices, query results of open items, un-posted items, and worksheets not set to post. The WorkCenter is divided into four pagelets – My Work, My Links, Queries and Reports, and

Processes

Grants Management

Because we are replacing our current customized project setup with the remaining modules of the Grants Suite (Projects, Grants, and Contracts), almost everything related to Grants is new. Highlights include:

- Grant WorkCenter that delivers content that is specific to each user that can be acted on from one page. This WorkCenter also provides links to common tasks, reports and queries.
- PeopleSoft delivered functionality for F&A calculations, revenue recognition, letter of credit, and cost sharing.
- The ability to setup and manage milestones billing as critical tasks are completed.

Source URL:https://www.cu.edu/new-fin-92-features

Links
[1] https://www.cu.edu/new-fin-92-features [2] https://www.cu.edu/controller/elevate/whattoexpect [3] https://www.cu.edu/controller/elevate-fin-attachments [4] https://www.cu.edu/controller/elevate-fin-menu-search