PeopleSoft User Group

March 13, 2013

Finance Impact Department

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PeopleSoft User Group

- SellWise update

- Time Study / Functional Expense

- Annual Budget Preparation

- PS/NVision Updates

- PeopleSoft conversion update

- General Ledger Users Guide Updates

SellWise Updates

- Update distributed in February
- Allows for four digit projects
- Allows for multiple council stores uploading into PeopleSoft
- Modifies "BSA Export" & "Reports"
- Utilizes standardized "glimport" file

Time Study / Functional Expense

- Recommended that Time Study should be completed every three years
- Compile results for four quarters
- Enter percentages in a Time Study Journal
- Section 5.4.2 (pg 5-4) of General Ledger Users Guide

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Annual Budget Preparation

- Doesn't have to wait until last part of year to compile

- Use "PeopleSoft Budget Upload Spreadsheet"

- Add budget lines as activity budgets are turned in

- Use Budget Analysis Report with scope for Budget Planning

PS/N-Vision Reports

- Working three new reports
  - Statement of Cash Flows
  - Detailed Project Management – Fund 2
  - Detailed Project Management – Fund 3
- Repaired errors in
  - Restricted funds reports

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Conversion Updates

- Converted 40 councils in 2012

- Added one council in January

- Converted 20 councils in February

- Converted 20 councils in March

- Plan to convert 49 councils in April

- Plan to convert 25 councils in May

- By June 1 will have 155 councils on PS

PeopleSoft Web Training

- Plan to have conversion training content streaming live
- Will publish the time blocks on FID Website
- Will have ability to signup
-

PeopleSoft Web Training

- Plan to create recorded webinars of short topics
- What topics would the group like to see?

National Support Center

- Identified 15 top calls

- Fiscal Management Team working with Support Center to create solution pages

- If you call the Support Center and they are unable to complete on first call, call back the next day

User Guide Updates

- Chapter 6 - Projects

- AP Updates – focused on 1099 Vendor Setup

Process Reminders

- Month End JTE Process
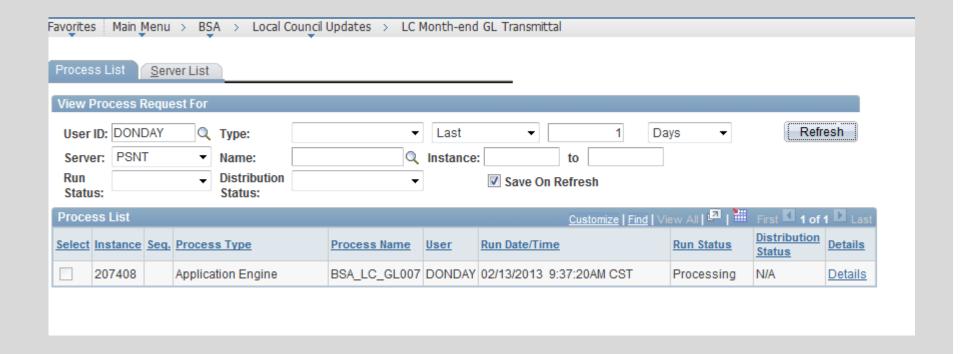- PS Add account for use in Scoutnet FR

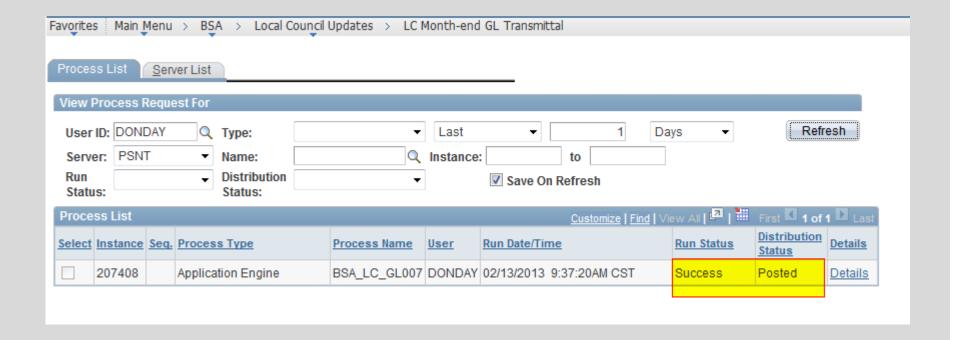# LC Month End Process - JTE

- Need to verify it runs to success

LC Month End Process - JTE

LC Month-end GL Process - JTE
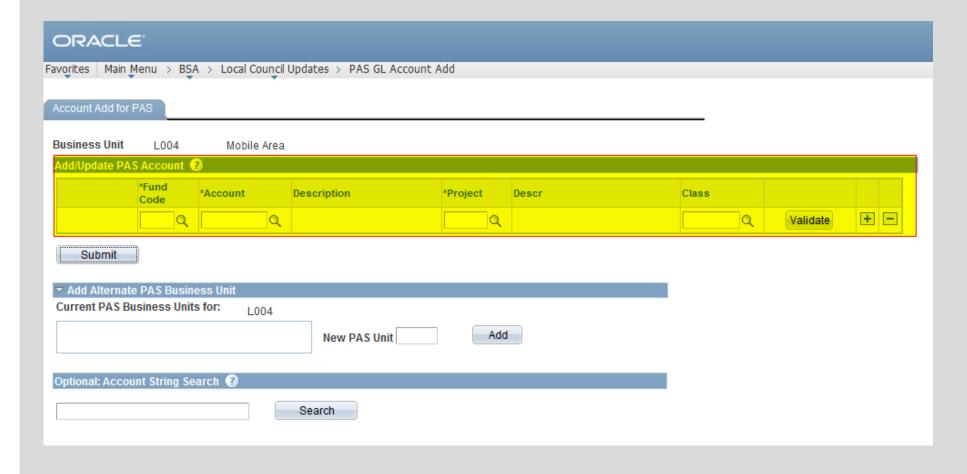
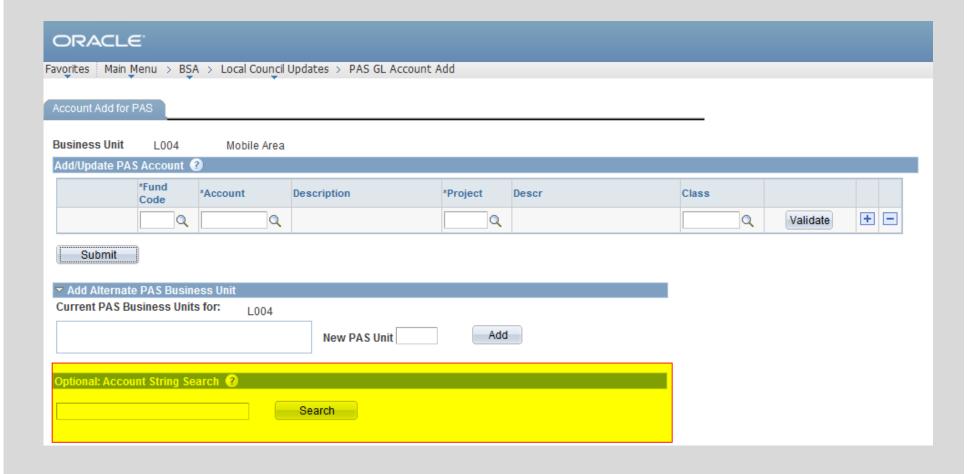# LC Month End GL Process - JTE
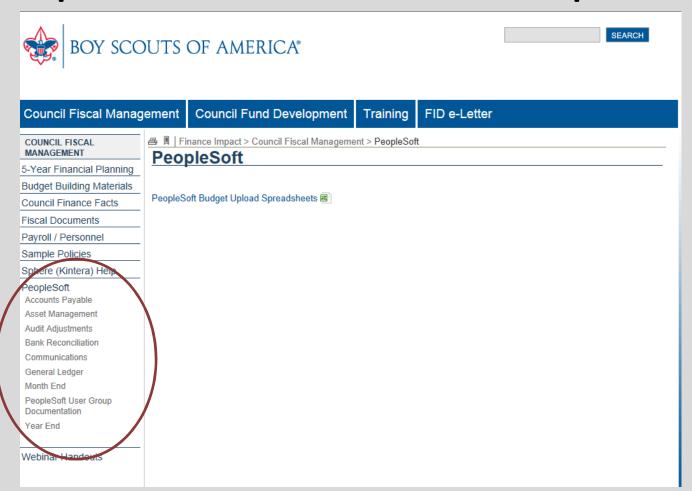
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PeopleSoft Information Updates

Discussion