

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



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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



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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



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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



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PeopleSoft Web Training

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



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PeopleSoft Web Training

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



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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



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User Guide Updates

- Chapter 6 - Projects
- AP Updates – focused on 1099 Vendor Setup



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Process Reminders

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



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LC Month End Process - JTE

- Need to verify it runs to success

GL Period Balances

Run Control ID: BSA-GL-Period-Balances [Report Manager](#) [Process Monitor](#) [Run](#) 5

Language: English

Report Request Parameters

Business Unit: 1 L590

Fiscal Year: 2 2012 Period: 3 11

4

[Save](#) [Notify](#) [Add](#) [Update/Display](#)





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LC Month End Process - JTE

Process Scheduler Request

User ID: CELLIS Run Control ID: BSA-GL-Period-Balances

Server Name: PSNT Run Date: 11/29/2012 
Recurrence: Run Time: 2:21:46PM [Reset to Current Date/Time](#)
Time Zone: 

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	GL Period Balances	BSA_LC_GL007	Application Engine	Web	TXT	Distribution

OK Cancel



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LC Month-end GL Process - JTE

Favorites Main Menu > BSA > Local Council Updates > LC Month-end GL Transmittal

Process List Server List

View Process Request For

User ID: Type: Last Days

Server: Name: Instance: to

Run Status: Distribution Status: ☒ Save On Refresh

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	207408		Application Engine	BSA_LC_GL007	DONDAY	02/13/2013 9:37:20AM CST	Processing	N/A	Details



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LC Month End GL Process - JTE

Favorites | Main Menu > BSA > Local Council Updates > LC Month-end GL Transmittal

Process List | Server List

View Process Request For

User ID: Type: Last Days Refresh

Server: Name: Instance: to

Run Status: Distribution Status: ☒ Save On Refresh

Process List Customize | Find | View All | First 1 of 1 Last

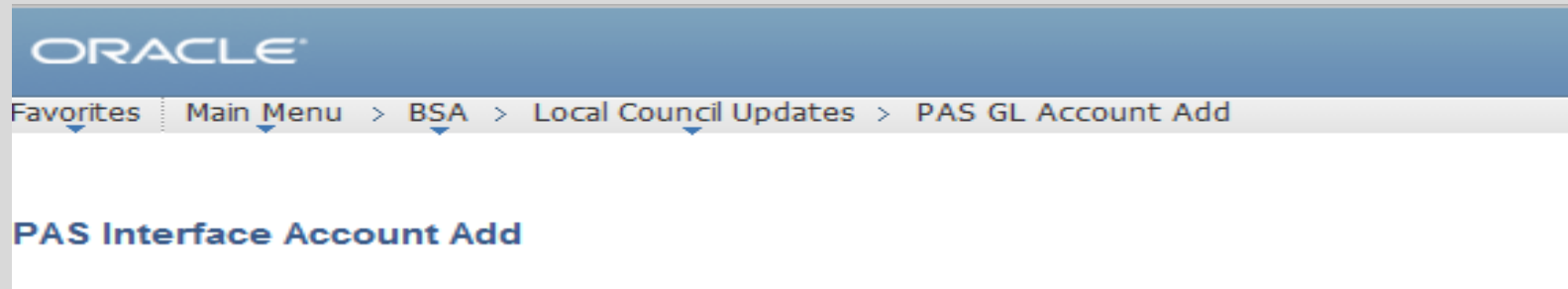
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	207408		Application Engine	BSA_LC_GL007	DONDAY	02/13/2013 9:37:20AM CST	Success	Posted	Details



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Add Account for Scoutnet FR



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Add Account for Scoutnet FR

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Favorites | Main Menu > BSA > Local Council Updates > PAS GL Account Add

Account Add for PAS

Business Unit L004 Mobile Area

Add/Update PAS Account ?

*Fund Code	*Account	Description	*Project	Descr	Class		
<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>	Validate	<input type="button" value="+"/> <input type="button" value="-"/>

▼ Add Alternate PAS Business Unit

Current PAS Business Units for: L004

New PAS Unit

Optional: Account String Search ?



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Add Account for Scoutnet FR

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*Fund Code	*Account	Description	*Project	Descr	Class			
<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="button" value="Validate"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

▼ Add Alternate PAS Business Unit

Current PAS Business Units for: L004

New PAS Unit

Optional: Account String Search ?



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PeopleSoft Information Updates



The screenshot shows the Boy Scouts of America website with a search bar at the top right. Below the header is a navigation bar with four tabs: "Council Fiscal Management", "Council Fund Development", "Training", and "FID e-Letter". The "Council Fiscal Management" tab is selected, and a sidebar on the left lists various financial management topics. The "PeopleSoft" link in this sidebar is circled in red. The main content area displays the "PeopleSoft" title and a link to "PeopleSoft Budget Upload Spreadsheets".

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SEARCH

Council Fiscal Management | Council Fund Development | Training | FID e-Letter

COUNCIL FISCAL MANAGEMENT

- 5-Year Financial Planning
- Budget Building Materials
- Council Finance Facts
- Fiscal Documents
- Payroll / Personnel
- Sample Policies
- Sphere (Kintera) Help
- PeopleSoft**
 - Accounts Payable
 - Asset Management
 - Audit Adjustments
 - Bank Reconciliation
 - Communications
 - General Ledger
 - Month End
 - PeopleSoft User Group Documentation
 - Year End
- Webinar Handouts

Finance Impact > Council Fiscal Management > PeopleSoft

PeopleSoft

PeopleSoft Budget Upload Spreadsheets



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Discussion



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