PeopleSoft User Group

November 09, 2016
User Group Agenda

- Tools Upgrade debriefing
- Budget process and uploads
- Year End Preparation
- 1099 Electronic Filing Prep
- Updating the Journey To Excellence
- Semi Annual SE security review
Tools Upgrade Debriefing

• Upgrade of PS tools
  – Implement PS tools 8.54
  – Correction of connectivity issues
  – Tech refresh with all new servers

• Issues Found
  – Printer configuration / Wycom Signature Machines
  – Unsupported operating Systems
  – nVision Layout changes (%SCD% variable)
  – Journal Upload character issue
  – Remote Login for some
Tools Upgrade Debriefing

– Journal Upload – Runs to success but does not show – Check Process monitor
– Journal Upload - no special characters in the journal ie: “%”
– Windows 8
– Browsers: Explorer 8, Firefox 18, Chrome current and above
– IE needs changes to “Compatibility View Settings”
Budget Preparation

• Chapter 14 of the user guide
• Recorded webinar on Finance Impact Site www.scouting.org/financeimpact
• Tools available
  – Queries
    • LC_ACTUAL_SPREADSHEET_FIS_YR
    • LC_BUDGET_FISCAL_YR – the starting point for budget
  – Report
    • Detail Budget Analysis – Scope
      – Run on 12-31-16
      – Provides current plus 2 years of history and budget
Budget Preparation

Budget Tools

Tools to make the budget process more simple in PeopleSoft:

1. PeopleSoft Budget Upload Spreadsheets
2. Budget Upload Tool Zip updated October 25, 2015 - file with macros - unzip these all to one file folder on your desktop

Budget in PeopleSoft
Budget & Actual Queries Introduced
Budget Upload Flat-File Instructions - shown at February 2016 PeopleSoft User group

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>JRNLT1.C.XLS</td>
<td>Microsoft Excel 97-2003</td>
</tr>
<tr>
<td>JRNLOG.XLS</td>
<td>Microsoft Excel 97-2003</td>
</tr>
<tr>
<td>JRNLMICRO.XLA</td>
<td>Microsoft Excel Add-In</td>
</tr>
</tbody>
</table>
14.4.1 Uploading Completed Budgets

The council should have an excel spreadsheet for gathering the budget data for uploading. The standard format is a file named "Journal Upload and Budget Upload Gathering Worksheet". The workbook contains instructions, a template to gather budget detail as above, and an upload formatted sheet for each month of the year.

Once gathered, budget numbers can be copied into a template that will upload them directly as journals into PeopleSoft. They arrive as unposted general journals which can be changed, edited and then posted or deleted for a retry.

14.4.1.1 Using the Gathering Template

Task #1 Open the Excel® Spreadsheet "Journal Upload and Budget Upload Gathering Worksheet"

Task #2 Fill in the Set-up Tab (Business Unit and "USD") as below. This will be saved and will be retried for future loads.
Budget Preparation

Fiscal Software User’s Guide, BSA

February 2013

Task #3 Copy and Paste or load the data being returned from budget work into the gathering document.

<table>
<thead>
<tr>
<th>Task</th>
<th>Ledger</th>
<th>GL Account</th>
<th>Project</th>
<th>Class</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
</tr>
</thead>
<tbody>
<tr>
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<td>BUDGET</td>
<td>1</td>
<td>6801</td>
<td>444</td>
<td>(350,000.00)</td>
<td>(400,000.00)</td>
<td>(380,000.00)</td>
<td>(12,500.00)</td>
<td>9,900.00</td>
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<td>73,600.00</td>
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<tr>
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<td>7301</td>
<td>99</td>
<td>69,166.00</td>
<td>68,266.00</td>
<td>68,266.00</td>
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<td>73,300.00</td>
<td>73,300.00</td>
<td>73,300.00</td>
<td></td>
</tr>
</tbody>
</table>

REMEMBER: Debits are entered as a positive number. Credits are entered as a negative number.

Do not budget for deferred months on projects that are deferred.

Task #4 Copy the data from the “Jan” tab into the upload template (January budgets)

HINT: First look at the “Jan” tab and count the lines you are about to copy to the upload template. Go to the bottom of the data and look at the Excel® row number then subtract 1 from that number. This will allow you to open the correct number of rows in the template for pasting. See instructions below on pasting data.

Task #4 Upload January budget data into the GL. After a successful upload, you will repeat the steps above and copy/upload “Feb”, “Mar” etc. Be sure you change the effective date on the upload template to match each month.
## Budget Preparation

**Task #2 - Set up the template**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Open the JRNL1 spreadsheet. This is the template that is used to upload journal entries into PeopleSoft.</td>
</tr>
<tr>
<td>2</td>
<td>Click on Setup. The user may see a message that asks if they want to Enable the Macros. Click Enable.</td>
</tr>
</tbody>
</table>
Budget Preparation

Step 3: Define Options and Defaults

Enter the proper Business Unit
Enter the default date
Enter the Ledger Group (ACTUALS or BUDGET)
Enter Source: GJ

**All other fields should default.** The address represents the environment. Users will be provided the Production address in the version provided during training.

Optional: Enter User ID (it can be loaded later)

Click OK
Budget Preparation

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>HINT: It is important to know how many lines of journal you are about to add. If the journal is already in an Excel® sheet, you can count the lines before copying the journal into this template. If you are creating it manually, you can add lines as needed.</td>
</tr>
</tbody>
</table>

**Spreadsheets Journal Import**

**Journal Header**
- Sys ID
- Unit
- Journal ID
- Date

**Journal Lines**
- Sys ID
- Journal ID
- Line #
- Unit
- Ledger
- Account
- Fund
- Ob

Select fields to copy from a previous line.

Click the **Plus sign** in the Journal lines section for one at a time addition of lines.

Click the **Plus sign** to add multiple lines. Enter the number of lines needed for the journal entry and click **Insert**.

**Insert Multiple Lines**
- Number of Lines
- From Line
- To Line

The minus signs can also be used to remove one line at a time or multiple lines.
Budget Preparation

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Establish the journal entry header</td>
</tr>
</tbody>
</table>

Enter a description. The other values default in from the Set up step. The Unit, Journal Date and Ledger Group can be changed from the default values in this window. Click OK.
Budget Preparation

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click New</td>
</tr>
</tbody>
</table>
| 2    | New Journal Sheet<br>New Journal Sheet Name: <input type="text" name="journalName" value="Jan 2013 Budget" placeholder="January 2013 Budget">
| 3    | Click on the first plus sign under Journal Header |

Click OK
### Budget Preparation

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td></td>
</tr>
</tbody>
</table>

#### Enter your data in the grey area and in this exact sequence: Business Unit, Ledger, Account, Fund, Class, Project, Currency (USD), Amount and Description, and start in the cell circled in red here. If you are pasting from another spreadsheet in the same format, please use the Paste Special = Paste Values method of pasting copied data. This example is a budget load.

**Note 1:** Amounts must be entered as a positive number for a Debit and a negative number for Credit when using the journal entry upload template.

**Note 2:** All the lines in template must be filled – No empty lines. If you have too many lines opened for your data, delete the empty lines.

**Note 3:** When uploading budget or journals from another spreadsheet, make sure the columns are in the correct order to match this template and
Budget Preparation

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>Use the “Home” button to get back to the main menu. <strong>NOTE:</strong> Once journals are loaded, the template archives them for reference. You can see and manage them using the Edit and Delete buttons.</td>
</tr>
</tbody>
</table>

- Edit
- Delete
- Copy
# Budget Preparation

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
General Ledger > Journals > Journal Entry > Create/Update Journal Entries |
| 2    | Search for the journal that was just created. Edit and Post journal.  
*For further instructions on editing and posting a journal. See the General Ledger section of the user guide or help function within PeopleSoft.
Year End Preparation

• Current with Monthly Reconciliations
• 1099 Preparation & Process
• Recording Fixed Asset Additions/Changes
• Updated Time Study for Functional Expense Rprt
• SellWise Year End Procedures
• Membership Year End Close Procedures
• Accounts Payables
• General Ledger
• Allocations
1099 Electronic Filing Prep
Resources

- Member Care Contact Center
1099 Electronic Filing

• Transmitter Control Code (TCC) number required
• IRS Form 4419 (Application for Filing Information Returns Electronically (FIRE))
• Create an online FIRE system account
  – [https://fire.irs.gov/firev1r/default.aspx](https://fire.irs.gov/firev1r/default.aspx)
Processing IRS Form 1099

- Step 1 – Identify vendors designated as 1099
- Step 2 – Identify vouchers that are 1099 applicable
- Step 3 – Select vouchers flagged as “N” in the query
- Step 4 – Update 1099 Withholding information
- Step 5 – Print the list of vendors with associated 1099 Vouchers
- Step 6 – Generate the 1099 MISC. forms and the “Test” for the IRS
- Step 7 – Generate the 1099 Misc. forms and the electric file for the IRS
Identify 1099 Withholding Vendors
Query LC_1099_VENDORS

<table>
<thead>
<tr>
<th>SetID</th>
<th>Vendor ID</th>
<th>Vendor Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>LT</td>
<td>01228</td>
<td>ALVAREZ-BIVER, VANESSA</td>
</tr>
<tr>
<td>LT</td>
<td>012067</td>
<td>BUSH REFRIGERATION</td>
</tr>
<tr>
<td>LT</td>
<td>002330</td>
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</tr>
<tr>
<td>LT</td>
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<td>DEALRAISER, LLC</td>
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<td>012168</td>
<td>GREEN, DONALD</td>
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<td>LT</td>
<td>0000000152</td>
<td>GUAY, STEFANIE</td>
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<td>LT</td>
<td>011556</td>
<td>JOHN'S HAULING</td>
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<td>LT</td>
<td>012520</td>
<td>KELLY COBB</td>
</tr>
<tr>
<td>LT</td>
<td>001607</td>
<td>KERBER, ECK &amp; BRAECKEL LLP</td>
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<tr>
<td>LT</td>
<td>011640</td>
<td>MAIL FINANCE</td>
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<td>PUCK'S MECHANICAL</td>
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<tr>
<td>LT</td>
<td>012530</td>
<td>SCHULT QUALITY TREE SERV.</td>
</tr>
<tr>
<td>LT</td>
<td>012290</td>
<td>VAREL TENT RENTALS</td>
</tr>
</tbody>
</table>

Download results in: Excel Spreadsheet, CSV Text File, XML File (1 kb)
### Identify 1099 Withholding Vendors

#### Query LC_1099_WITHHOLDING_INFORMATION

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<tr>
<th>Instance</th>
<th>Unit</th>
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<th>Type</th>
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<th>Class</th>
<th>Rule</th>
<th>Juridicial</th>
<th>Vendor</th>
<th>Location</th>
<th>Address</th>
<th>SetID</th>
<th>Bank</th>
<th>Account</th>
<th>Method</th>
<th>Payment</th>
<th>IBI Tax ID</th>
<th>Tax ID</th>
<th>Currency</th>
<th>Rate Type</th>
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<th>Declared Date</th>
<th>Posted</th>
<th>Return Amt</th>
<th>Description</th>
<th>Process Date</th>
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</thead>
<tbody>
<tr>
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<td></td>
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</tr>
</tbody>
</table>
Identify Vouchers
Query LC_VENDORS_VOUCHERS

```
<table>
<thead>
<tr>
<th>SetID</th>
<th>Voucher ID</th>
<th>Voucher Line Number</th>
<th>Vendor ID</th>
<th>Vendor Name</th>
<th>Amount</th>
<th>Vendor 1099 Flag</th>
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<tbody>
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<td>Y</td>
</tr>
</tbody>
</table>
```

Download results in: Excel Spreadsheet, CSV Text File, XML File (21 kb)
Journey to Excellence Submission
Journey to Excellence Submission

• Submitting JTE
• Populate the Finance Facts database
• This is not an automatic process
• Part of the month-end process
• After making Audit Adjustments
Journey to Excellence Submission

GL Period Balances

Run Control ID: BSA_GL_Period_Balance
Language: English

Report Request Parameters
1. Business Unit: L114
2. Fiscal Year: 2016
3. Period: 10

Save Notify

Run

Add Update/Display

BOY SCOUTS OF AMERICA
Prepared. For Life.™
Journey to Excellence Submission

![Screenshot of a process list with a check box to verify both "Success" and "Posted".]

- **User ID**: MCREEGH
- **Process Name**: BSA_LC_GL007
- **Run Date/Time**: 11/06/2016 4:16:10 PM CST
- **Run Status**: Success
- **Distribution Status**: Posted

**Instructions:**
- Go back to BSA GL Period Balances
- Verify both "Success" & "Posted"
Journey to Excellence Submission

• Using the “Refresh” button, wait until status is complete with “Success” in the Run Status column and “Posted” in the Distribution Status

• If this process completes with an “Error” in the Run Status, contact the Member Care Contact Center to report this condition.
Journey to Excellence Submission

- Close Each Month
- Close again if you make prior period adjusted
- Close again if when you make Audit adjustments (you would re-close each month)
- If you are doing multiple monthly closes in the same day you’ll need to wait four hours between submissions
PeopleSoft User Security

The Scout Executive’s Role
PeopleSoft User Security
PeopleSoft User Security

Security Review

Business Unit: [Business Unit]

Information/Instructions

Please review the list of security roles for the users listed below by clicking on each name. To remove a security role, uncheck the box next to the role. An email will automatically be sent to the Member Care Contact Center for processing. Once you have completed the user role security review, please check the “Certify” box then click on the “submit as reviewed” button below. You will receive an email notification confirming the completion of the audit review. If any other changes are required, please complete a new Local Council PeopleSoft Security Request form and submit it to the Member Care Contact Center (22001, 1).

Audit Details

Audit Year: 2016 Audit Period: 1 Review Dates: 01/01/2016 thru: 06/30/2016
Review Deadline: 06/30/2016 Review Status: Incomplete

Council Users

<table>
<thead>
<tr>
<th>User</th>
<th>Name</th>
<th>Type</th>
<th>Last Reviewed</th>
<th>Change Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>User1</td>
<td>[User1 Name]</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>User2</td>
<td>[User2 Name]</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>User3</td>
<td>[User3 Name]</td>
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</tr>
</tbody>
</table>

Certify

By clicking this box, I certify that I have reviewed the list of users for this review period. I also certify that the selected users have permission to access the financial records for [Financial Record Details] (22001, 2).

Submit as Reviewed
PeopleSoft User Security

- BSA LC AP Inquiry
- BSA LC AP Manager
- BSA LC AP Reporting
- BSA LC AP Staff
- BSA LC Banking 01
- BSA LC Executive
- BSA LC Field Staff
- BSA LC GL Design CF projects
- BSA LC GL Manager
- BSA LC GL Post access
- BSA LC GL Reports
- BSA LC GL Staff
- BSA LC GL Journal Entry
PeopleSoft User Security

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Audit Details
- Audit Year: 2016
- Audit Period: 1
- Review Dates: 09/01/2015 thru: 09/30/2015
- Review Deadline: 09/30/2016
- Review Status: Incomplete

Council Users

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Certify
- By clicking this box, I certify that I have reviewed the list of users for this review period. I also certify that the selected users have permission to access the financial records for LM14 LSLA (22001.2).

Submit as Reviewed
Future Scheduled Webinar

December 14, 2016
10:00AM & 2:00PM
Central
2017 Training Opportunities
www.scouting.org/FinanceImpact/Training

• **First Time Accounting Specialist Training**
  – $700.00 four courses in 2017 at ScoutingU Westlake, TX

• **Fiscal Management I**
  – $200.00 five courses in 2017 at various Council offices around the country

• **Fiscal Management II**
  – $275.00 Two courses in 2017 – April 4-5 & September 12-13
Member Care Contact Center

• Needs User Guide
• Best practices
• Accounting calls have a special queue
• Three care members rotate on calls
• Reviewing how calls will be handled next year

• For assistance, please contact the Member Care Contact Center through the online Support Center site in MyBSA or at (855) 707-2644
Feedback Time

• Questions
• Best practices
• Needs
• Requests for future user group topics email michael.creagh@scouting.org