

# PeopleSoft User Group

November 09, 2016



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# 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



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# 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](http://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

Finance Impact > Council Fiscal Management > PeopleSoft Documents > Budget Tools

## 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, 2016 - 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

Name	Type
JRNL1_LC.XLS	Microsoft Excel 97-2003 ...
JrnlLog.xls	Microsoft Excel 97-2003 ...
JRNLMCRO.XLA	Microsoft Excel Add-In



# Budget Preparation

## 14.4.1 Uploading Completed Budgets

The council should have an excel spread sheet 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 retrained for future loads.

Fill in the two cells below	
L556	PeopleSoft Business Unit (usually L999 - Council Number)
USD	Currency (USD unless otherwise directed by user)
<b>Data Preparation Steps:</b>	
Step 1	Gather your data for journal upload. This can be to either ACTUALS of BUDGET ledger as indicated by the tabs below.
Step 2	Organize your data in the order of columns as in the selected "Master" tab below. The order is important. Arranged y
Step 3	Copy your data from your source and "MAS1 SPECIAL - VALUES" only into the selected "MASTER" sheet for either Actua
Step 1	After all the budget data you wish to load is placed into the Master Tab. Count the number of lines in your data belo
Step 2	Open your import file JRNLLC.xls - Set up your Header for your Business Unit including the date that is in the perio
Step 3	Add the number of rows in the JRNLLC.xls file that will match your data rows. This is done by clicking the button shown at the right here and entering the number of rows to add <b>+</b>
Step 4	Start with Then add Row numbers in the upload template so they match your data and there is a row number in the grey portio



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# 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.

Paste your Data here beginning with Cell C4 across the months you are entering now. USE THE PAST SPECIAL - VALUES setting.

Header		GL Account				Periods							
Bus Unit	Ledger	Fund	Account	Project	Class	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
L556	BUDGET	1	6801	444	20						(5,600.00)		
L339	BUDGET	1	8301	444	20						4,800.00		
L556	BUDGET	1	4001	000	90	(250,000.00)	(400,000.00)	(280,000.00)	(12,500.00)				
L556	BUDGET	1	7002	000	99	68,500.00	68,500.00	68,500.00	72,600.00	72,600.00	72,600.00	72,600.00	72,600.00

**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.**

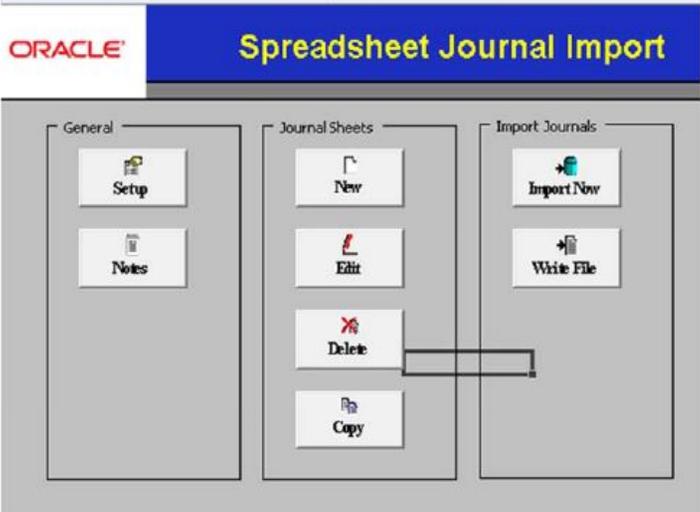


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## Task #2 - Set up the template

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



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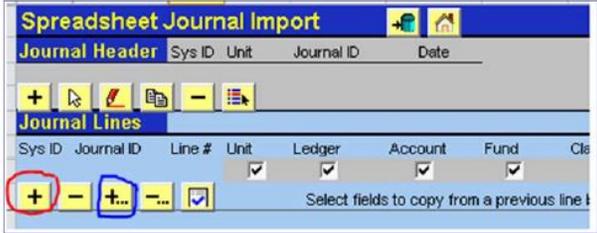
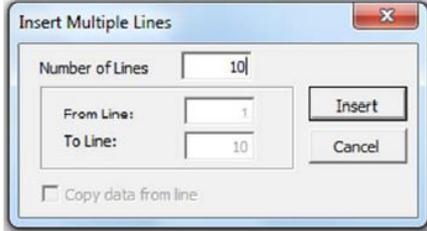
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Step	Action
3	<div data-bbox="756 397 1543 933" style="border: 1px solid black; padding: 5px;"> <p><b>Define Options and Defaults</b></p> <p><b>Header Defaults</b></p> <p>Business Unit: <input type="text" value="L144"/></p> <p>Date: <input type="text" value="01/01/2011"/></p> <p>Ledger Group: <input type="text" value="BUDGET"/></p> <p>Source: <input type="text" value="GJ"/></p> <p>User ID: <input type="text"/></p> <p><input type="checkbox"/> Enable Multibook</p> <p><input checked="" type="checkbox"/> AutoGen Lines</p> <p><b>Message Options</b></p> <p><input type="radio"/> Log Error Message only</p> <p><input checked="" type="radio"/> Log Successful and Error Message</p> <p><input checked="" type="checkbox"/> Display Messages Online</p> <p><b>Document Sequencing</b></p> <p><input type="checkbox"/> Enable Document Sequencing</p> <p>Default Document Type: <input type="text"/></p> <p><b>Online Import Control</b></p> <p>Address: <input type="text" value="http://ntlwebpp16.netbsa.org:8140/xmlink/"/></p> <p>User ID: <input type="text"/></p> <p><b>After successful import</b></p> <p><input type="radio"/> Change import status to Do Not Import</p> <p><input checked="" type="radio"/> Keep import status as Import</p> <p><input type="checkbox"/> Skip if Journal already exists</p> <p><input type="checkbox"/> Skip if Journal has error</p> <p>OK</p> <p>Cancel</p> <p>Configure</p> </div> <p>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.</p> <p>Optional: Enter User ID (It can be loaded later)</p> <p>Click OK</p>



# Budget Preparation

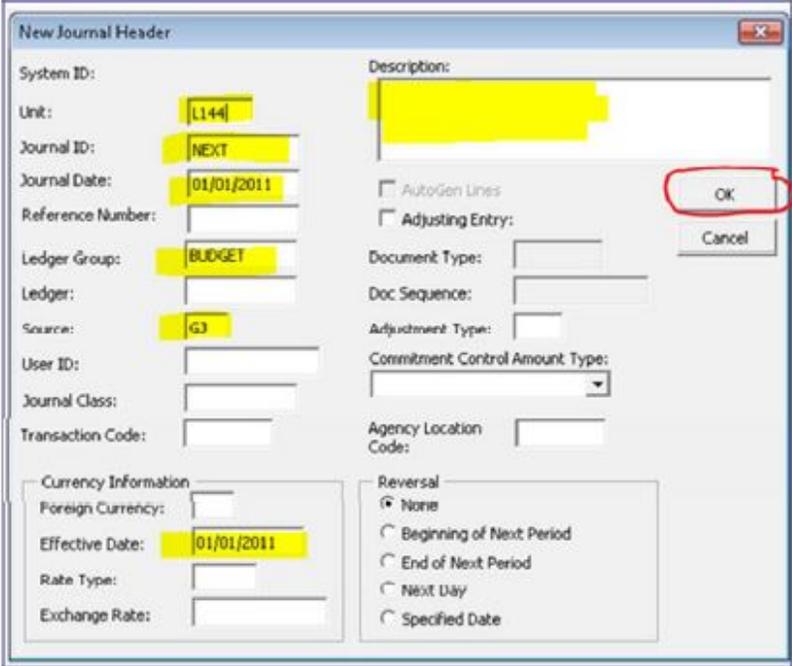
Step	Action
5	<p>HINT: It is important to know how many lines of journal you are about to add. If the journal is already in an Excel® sheet, you can count the lines before copying the journal into this template. If you are creating it manually, you can add lines as needed.</p>  <p>Click the <b>Plus sign</b> in the Journal lines section for one at a time addition of lines. </p> <p>Click the <b>Plus...</b> sign to add multiple lines. Enter the number of lines needed for the journal entry and click <b>Insert</b>.</p>   <p>The minus signs can also be used to remove one line at a time or multiple lines.  </p>



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# Budget Preparation

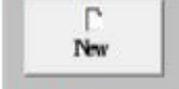
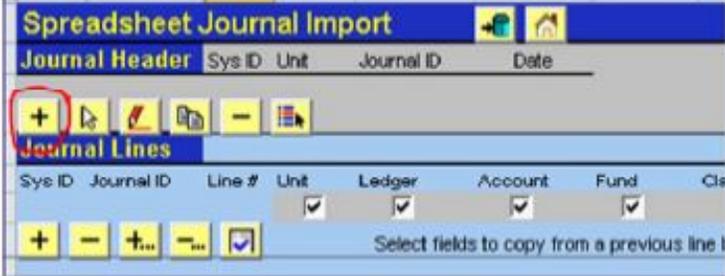
Step	Action
4	<p>Establish the journal entry header</p> <div data-bbox="730 456 1522 1122"></div> <p>Enter a description. The other values default in from the Set up step. The Unit, Journal Date and Ledger Group can be changed from the default values in this window. Click <b>OK</b></p>



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Step	Action
1	 Click <b>New</b>
2	 Enter the Journal Sheet Name i.e. <b>January 2013 Budget</b> Click <b>OK</b>
3	 Click on the first plus sign under Journal Header 



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# Budget Preparation

Step	Action																																																																																																												
6	<div data-bbox="604 402 1516 760"> <table border="1"> <thead> <tr> <th>Sys ID</th> <th>Journal ID</th> <th>Line #</th> <th>Unit</th> <th>Ledger</th> <th>Account</th> <th>Fund</th> <th>Class</th> <th>Project</th> <th>Currency</th> <th>Amount</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1007</td> <td>000000776</td> <td>1</td> <td>L556</td> <td>ACTUALS</td> <td>4001</td> <td>1</td> <td>90</td> <td>000</td> <td>USD</td> <td>(27,214.88)</td> <td>Budget Load</td> </tr> <tr> <td>1007</td> <td>000000776</td> <td>2</td> <td>L556</td> <td>ACTUALS</td> <td>4069</td> <td>1</td> <td>90</td> <td>000</td> <td>USD</td> <td>2,721.49</td> <td>Budget Load</td> </tr> <tr> <td>1007</td> <td>000000776</td> <td>3</td> <td>L556</td> <td>ACTUALS</td> <td>4201</td> <td>1</td> <td>90</td> <td>256</td> <td>USD</td> <td>(5,000.00)</td> <td>Budget Load</td> </tr> <tr> <td>1007</td> <td>000000776</td> <td>4</td> <td>L556</td> <td>ACTUALS</td> <td>4249</td> <td>1</td> <td>90</td> <td>256</td> <td>USD</td> <td>500.00</td> <td>Budget Load</td> </tr> <tr> <td>1007</td> <td>000000776</td> <td>5</td> <td>L556</td> <td>ACTUALS</td> <td>4401</td> <td>1</td> <td>90</td> <td>125</td> <td>USD</td> <td>(10,000.00)</td> <td>Budget Load</td> </tr> <tr> <td>1007</td> <td>000000776</td> <td>6</td> <td>L556</td> <td>ACTUALS</td> <td>4701</td> <td>1</td> <td>90</td> <td>400</td> <td>USD</td> <td>(6,000.00)</td> <td>Budget Load</td> </tr> <tr> <td>1007</td> <td>000000776</td> <td>7</td> <td>L556</td> <td>ACTUALS</td> <td>4702</td> <td>1</td> <td>90</td> <td>400</td> <td>USD</td> <td>(2,500.00)</td> <td>Budget Load</td> </tr> <tr> <td>1007</td> <td>000000776</td> <td>8</td> <td>L556</td> <td>ACTUALS</td> <td>6501</td> <td>1</td> <td>90</td> <td>027</td> <td>USD</td> <td>(22,000.00)</td> <td>Budget Load</td> </tr> </tbody> </table> </div> <p>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.</p> <p><b>Note 1:</b> Amounts must be entered as a positive number for a Debit and a negative number for Credit when using the journal entry upload template.</p> <p><b>Note 2:</b> 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.</p> <p><b>Note 3:</b> When uploading budget or journals from another spreadsheet, make sure the columns are in the correct order to match this template and</p>	Sys ID	Journal ID	Line #	Unit	Ledger	Account	Fund	Class	Project	Currency	Amount	Description	1007	000000776	1	L556	ACTUALS	4001	1	90	000	USD	(27,214.88)	Budget Load	1007	000000776	2	L556	ACTUALS	4069	1	90	000	USD	2,721.49	Budget Load	1007	000000776	3	L556	ACTUALS	4201	1	90	256	USD	(5,000.00)	Budget Load	1007	000000776	4	L556	ACTUALS	4249	1	90	256	USD	500.00	Budget Load	1007	000000776	5	L556	ACTUALS	4401	1	90	125	USD	(10,000.00)	Budget Load	1007	000000776	6	L556	ACTUALS	4701	1	90	400	USD	(6,000.00)	Budget Load	1007	000000776	7	L556	ACTUALS	4702	1	90	400	USD	(2,500.00)	Budget Load	1007	000000776	8	L556	ACTUALS	6501	1	90	027	USD	(22,000.00)	Budget Load
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# Budget Preparation

Step	Action
8	<p data-bbox="594 492 653 537"></p> <p data-bbox="667 513 1444 548">Use the "Home" button to get back to the main menu.</p> <p data-bbox="594 553 1688 654"><b>NOTE:</b> Once journals are loaded, the template archives them for reference. You can see and manage them using the Edit and Delete buttons.</p> <div data-bbox="594 659 886 1076" style="border: 1px solid gray; padding: 5px;"><p data-bbox="632 678 848 776"> Edit</p><p data-bbox="632 813 848 911"> Delete</p><p data-bbox="632 948 848 1045"> Copy</p></div>



# Budget Preparation

Step	Action
1	<p>Log into PeopleSoft. Navigate to Create/Update Journal Entries.</p> <p>General Ledger &gt; Journals &gt; Journal Entry &gt; Create/Update Journal Entries</p> 
2	<p>Search for the journal that was just created. Edit and Post journal.</p> <p>*For further instructions on editing and posting a journal. See the General Ledger section of the user guide or help function within PeopleSoft.</p>



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# 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



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# Resources

- General Instructions <https://www.irs.gov/pub/irs-pdf/i1099msc.pdf>
- Council Fiscal Management -  
[http://www.scouting.org/FinanceImpact/Council/Fiscal/Management/PeopleSoft/Year\\_End.aspx](http://www.scouting.org/FinanceImpact/Council/Fiscal/Management/PeopleSoft/Year_End.aspx)
- Member Care Contact Center



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# 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>



# 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

LC\_1099\_VENDORS

SetID:

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (1 kb)

[View All](#)

	SetID	Vendor ID	Vendor Name
1	L1111	011228	ALVAREZ-BIVER, VANESSA
2	L1111	012067	BUSH REFRIGERATION
3	L1111	002330	CLIFTONLARSONALLEN, LLP
4	L1111	0000000098	DEALRAISER, LLC
5	L1111	012168	GREEN, DONALD
6	L1111	0000000152	GUAY, STEFANIE
7	L1111	011556	JOHN'S HAULING
8	L1111	012520	KELLY COBB
9	L1111	001607	KERBER,ECK,&BRAECKEL LLP
10	L1111	011640	MAILFINANCE
11	L1111	0000000377	Puck's Mechanical
12	L1111	012539	SCHULT QUALITY TREE SERV.
13	L1111	012290	VAREL TENT RENTALS



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# Identify 1099 Withholding Vendors

## Query LC\_1099\_WITHHOLDING\_INFORMATION

LC\_1099\_WITHHOLD\_INFORMATION

Unit:

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File \(73 kb\)](#)

[View All](#) First  [Last](#)

	Instance	Unit	Entity	Type	Jurisdiction	Class	Rule	Vndr SetID	Vendor	Location	Address	SetID	Bank	Account	Method	Payment	BU Tax ID	Tax ID	Currency	Rate Type	Date	Posted	Declarat Date	Basis Amt	Descriptio	Process Date
1	0	L114	IRS	1099	FED	07	RULE0	L114	0000000098	01	1 L	BK001	CHK1	CHK	0000000482	94-3462285	12-3333333	USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	3096.450	Withhold Update	01/29/2014	
2	0	L114	IRS	1099	FED	07	RULE0	L114	0000000152	01	1 L	BK001	CHK1	CHK	0000000653	94-3462285		USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	500.000	Withhold Update	01/29/2014	
3	0	L114	IRS	1099	FED	07	RULE0	L114	0000000152	01	1 L	BK001	CHK1	CHK	0000000712	94-3462285		USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	500.000	Withhold Update	01/29/2014	
4	0	L114	IRS	1099	FED	07	RULE0	L114	0000000152	01	1 L	BK001	CHK1	CHK	0000000778	94-3462285		USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	500.000	Withhold Update	01/29/2014	
5	0	L114	IRS	1099	FED	07	RULE0	L114	0000000152	01	1 L	BK001	CHK1	CHK	0000000809	94-3462285		USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	500.000	Withhold Update	01/29/2014	
6	0	L114	IRS	1099	FED	07	RULE0	L114	0000000152	01	1 L	BK001	CHK1	CHK	0000000899	94-3462285		USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	750.000	Withhold Update	01/29/2014	
7	0	L114	IRS	1099	FED	07	RULE0	L114	0000000152	01	1 L	BK001	CHK1	CHK	0000000961	94-3462285		USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	500.000	Withhold Update	01/29/2014	
8	0	L114	IRS	1099	FED	07	RULE0	L114	0000000152	01	1 L	BK001	CHK1	CHK	0000001002	94-3462285		USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	500.000	Withhold Update	01/29/2014	
9	0	L114	IRS	1099	FED	07	RULE0	L114	0000000152	01	1 L	BK001	CHK1	CHK	0000001011	94-3462285		USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	0.000	Withhold Update	01/29/2014	



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# Identify Vouchers

## Query LC\_VENDORS\_VOUCHERS

LC\_1099\_VENDORS\_VOUCHERS

SetID:

From Acctg Date:

To Acctg Date:

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (21 kb)

[View All](#)

	SetID	Voucher ID	Voucher Line Number	Vendor ID	Vendor Name	Amount	Vendor 1099 Flag
1	L-111	00005756		012067	BUSH REFRIGERATION	206.75	Y
2	L-111	00006554		012067	BUSH REFRIGERATION	651.59	Y
3	L-111	00004741		002330	CLIFTONLARSONALLEN, LLP	4500.00	Y
4	L-111	00005100		002330	CLIFTONLARSONALLEN, LLP	4500.00	Y
5	L-111	00005301		002330	CLIFTONLARSONALLEN, LLP	4500.00	Y
6	L-111	00005514		002330	CLIFTONLARSONALLEN, LLP	4500.00	Y
7	L-111	00005814		002330	CLIFTONLARSONALLEN, LLP	4500.00	Y
8	L-111	00005974		002330	CLIFTONLARSONALLEN, LLP	4500.00	Y
9	L-111	00006204		002330	CLIFTONLARSONALLEN, LLP	4500.00	Y
10	L-111	00006510		002330	CLIFTONLARSONALLEN, LLP	4500.00	Y
11	L-111	00006717		002330	CLIFTONLARSONALLEN, LLP	4500.00	Y
12	L-111	00006922		002330	CLIFTONLARSONALLEN, LLP	4500.00	Y



# Journey to Excellence Submission



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# 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



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# Journey to Excellence Submission

CRMS

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

GL Period Balances

Run Control ID: BSA\_GL\_Period\_Balance      Report Manager      Process Monitor      **5** Run

Language: English

Report Request Parameters

Business Unit: **1** L114

Fiscal Year: **2** 2016      Period: **3** 10

**4** Save      Notify      Add      Update/Display



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# Journey to Excellence Submission

Process List | Server List

View Process Request For

User ID: MCREAGH  Type:  Last  1 Hours  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"/>	3584335		Application Engine	BSA_LC_GL007	MCREAGH	11/05/2015 4:16:10PM CST	Success	Posted	<a href="#">Details</a>

**Verify both "Success" & "Posted"**

[Go back to BSA GL Period Balances](#)

Process List | [Server List](#)



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# 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.



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# 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



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# PeopleSoft User Security

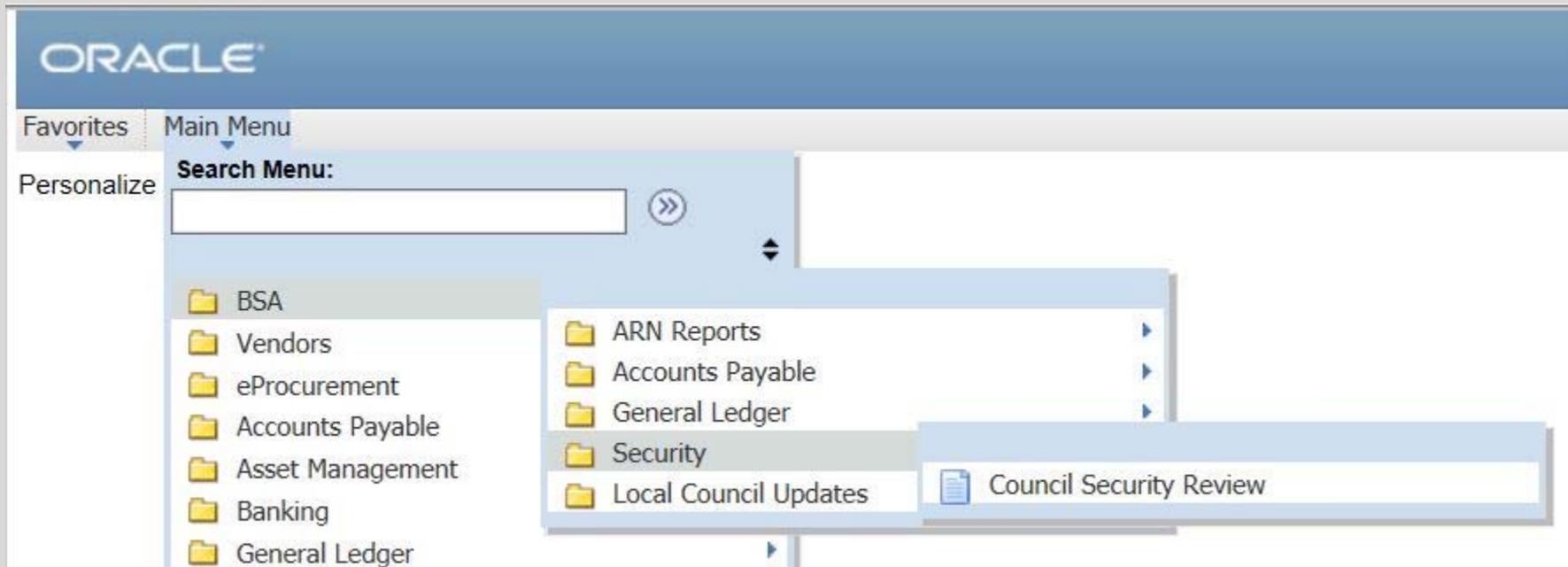
## The Scout Executive's Role



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# PeopleSoft User Security



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# PeopleSoft User Security

Favorites | Main Menu > BSA > Security > Council Security Review

**Security Review**

**Business Unit:** LFA [View Details](#) [Create Report](#)

**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** [Customize](#) | [Find](#) | [View All](#) | [Print](#) | [Grid](#) | [First](#) | 1-3 of 3 | [Last](#)

User	Name	Type	Last Reviewed	Change Needed
<a href="#">View Details</a>	Operator			<input type="checkbox"/>
<a href="#">View Details</a>	Local Council			<input type="checkbox"/>
<a href="#">View Details</a>	Member Family			<input type="checkbox"/>

[Role Add/Change Form](#)

**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 LFA Local Council Council (22001,2).



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# PeopleSoft User Security

ORACLE

Favorites | Main Menu > BSA > Security > Council Security Review

<input checked="" type="checkbox"/>	BSA LC AP Inquiry
<input checked="" type="checkbox"/>	BSA LC AP Manager
<input checked="" type="checkbox"/>	BSA LC AP Reporting
<input checked="" type="checkbox"/>	BSA LC AP Staff
<input checked="" type="checkbox"/>	BSA LC Banking 01
<input checked="" type="checkbox"/>	BSA LC Executive
<input checked="" type="checkbox"/>	BSA LC Field Staff
<input checked="" type="checkbox"/>	BSA LC GL Design CF projects
<input checked="" type="checkbox"/>	BSA LC GL Manager
<input checked="" type="checkbox"/>	BSA LC GL Post access
<input checked="" type="checkbox"/>	BSA LC GL Reports
<input checked="" type="checkbox"/>	BSA LC GL Staff
<input checked="" type="checkbox"/>	BSA LC GL- Journal Entry



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# PeopleSoft User Security

Favorites | Main Menu > BSA > Security > Council Security Review

Security Review

Business Unit: [LIFE](#) [View All](#) [Create Report](#)

**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).

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Review Deadline: 06/30/2016    Review Status: **Incomplete**

**Council Users**    [Customize](#) | [Find](#) | [View All](#) | [Print](#) | [Grid](#)    First 1-3 of 3 Last

User	Name	Type	Last Reviewed	Change Needed
<a href="#">[Link]</a>	[Name]			<input type="checkbox"/>
<a href="#">[Link]</a>	[Name]			<input type="checkbox"/>
<a href="#">[Link]</a>	[Name]			<input type="checkbox"/>

[Role Add/Change Form](#)

**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 [LIFE](#) [View All](#) [Create Report](#) (22001,2).

[Submit as Reviewed](#)



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# Future Scheduled Webinar

**December 14, 2016**

**10:00AM & 2:00PM**

**Central**



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# 2017 Training Opportunities

[www.scouting.org/FinanceImpact/Training](http://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



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# 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



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# Feedback Time

- Questions
- Best practices
- Needs
- Requests for future user group topics email [michael.creagh@scouting.org](mailto:michael.creagh@scouting.org)

