ELEVATE – PeopleSoft FIN Upgrade Update

November 2015

Finance Update

Timeline and Outage Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/2/2015</td>
<td>All Nov JE’s must be entered and approved</td>
</tr>
<tr>
<td>12/2/2015</td>
<td>Campus Close for Nov 2015</td>
</tr>
<tr>
<td>12/3/2015</td>
<td>Last day to complete activities in FIN</td>
</tr>
<tr>
<td>12/3/2015</td>
<td>All unapproved journals in 8.4 will be deleted</td>
</tr>
<tr>
<td>12/3/2015 5:00 pm through 12/9/2015</td>
<td>FIN Outage, No access to FIN (CIW will be available)</td>
</tr>
<tr>
<td>12/10/2015</td>
<td>FIN 9.2 Available, Resume business</td>
</tr>
</tbody>
</table>

Post Go-Live Resources

- Dedicated Elevate team members will be on-site the first two weeks after go-live
- They will be stationed and available in ARC 412 as well as in the Engineering Center Dean’s Office

CIW Testing

- The CIW test environment is now available! Please begin testing your shadow systems, access databases, and portals!
- A crosswalk of changes can be found here: https://content.cu.edu/irm/CUonly/dwhse/CIWCrossWalk.xlsx
- A recorded webinar is also available: https://www.cusys.edu/uis/CUonly/ciw/webinar_recording_942015.html
- Step by steps can be found here: http://www.cu.edu/university-information-systems/elevate-ciw-training

Integrations Testing

- We also have the environments ready for system integrations testing. We will open the environments to testers as they are ready to begin testing their integrations with MarketPlace, Concur, HR, Campus Solutions, etc. Please let me know when you are ready to test these integrations and I can help facilitate access.

Blackbox

- Blackbox is now available for testing!
  - If you currently utilize Blackbox and plan to do so after the upgrade, please be sure to complete the top portion of this form up to required signatures and submit it to Vickie.Martin@cu.edu to begin the access process: https://www.cusys.edu/ums/security/CUonly/AMPS/Forms/File-Transfer-Server-Dir-Access.pdf
  - Blackbox is being replaced with a new solution. However, departments should be able to continue using their current Blackbox file formats, although files will be uploaded using CU Transfer. Minimal impact should be experienced on campus, but thorough testing is essential
  - Files will be processed as they are uploaded to the server, so you shouldn’t experience delays like in today’s system

Browser Compatibility

- Is your browser compatible with 9.2? Please check this site for more details on supported configurations: http://www.cu.edu/uis/uis-service-desk/policies-guidelines/supported-elevate-browsers
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**Reporting Review and Strategy**

- In the past few months, there have been significant improvements to m-Fin. If you haven’t checked out m-Fin lately, the Crosswalk sessions are a great way to catch up on the latest improvements!
- We have completed an extensive review and analysis of the m-Fin reporting requests we’ve received throughout the campus.
- If you submitted an m-Fin reporting request and I haven’t touched base with you, please let me know!
- **We have identified a handful of requests that aren’t addressed in the latest improvements to m-Fin**
  - We will work to develop new reports to meet these needs after go-live
    - A list of those reports we plan to tackle, include the ability to:

<table>
<thead>
<tr>
<th>Report Ability</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pull data by transaction date rather than by period for programs</td>
<td>In Progress</td>
</tr>
<tr>
<td>Filter by attributes</td>
<td>TBD, after go-live</td>
</tr>
<tr>
<td>Report upon ICR splits</td>
<td>TBD, after go-live</td>
</tr>
<tr>
<td>Payroll by date range</td>
<td>TBD, after go-live</td>
</tr>
<tr>
<td>Pull by org direct and indirect costs by date range</td>
<td>Available Now!</td>
</tr>
</tbody>
</table>

**The Employee Portal is Changing**


**Testing**

- Round 3, the final round of testing is underway
- If you are a designated tester, please be sure to check the testing scenarios workbook often for updates on what is ready for testing!
  - Please watch for emails from Eileen Teel, the System team’s testing coordinator
- **If you would like to get involved with testing, please let me know**
- **User Acceptance Testing** is scheduled through **November** and includes all users testing the system

**Training Resources**

- Did you miss the training or need a refresher? Don’t worry, the Elevate site has a wealth of information
- There is **one final in-person JE training on 11/16**! Please visit the Elevate calendar for more details:
- FIN Overview learning resources: [http://www.cu.edu/controller/elevate-fin-overview-learning-resources-main-page](http://www.cu.edu/controller/elevate-fin-overview-learning-resources-main-page)
- JE learning resources: [http://www.cu.edu/controller/elevate-fin-journal-entry-learning-resources](http://www.cu.edu/controller/elevate-fin-journal-entry-learning-resources)
- What to expect: [http://www.cu.edu/controller/elevate/whattoexpect](http://www.cu.edu/controller/elevate/whattoexpect)
- JE Attachments: [http://www.cu.edu/controller/elevate-fin-attachments](http://www.cu.edu/controller/elevate-fin-attachments)
- Menu search: [http://www.cu.edu/controller/elevate-fin-menu-search](http://www.cu.edu/controller/elevate-fin-menu-search)
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Are you using PSLite?

- We have one remaining PSLite to mFIN Crosswalk session! If you’re still using PSLite, please plan on attending one of these sessions to help you with the transition.
- Crosswalk documentation is available at the following site: http://www.cu.edu/controller/reporting-system
- Crosswalk sessions have been established and provide an opportunity to learn about the new and improved mFin platform, learn tips and tricks, and understand the crosswalk in more detail as we prepare for the upgrade.
  - The first half will be training and the second half will be allotted to answer questions from attendees.

<table>
<thead>
<tr>
<th>PS Lite to m-Fin Crosswalk Training Schedule</th>
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<tbody>
<tr>
<td>Date</td>
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<tr>
<td>Thursday, November 19, 2015</td>
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</table>

- In addition, the m-Fin reporting team will be holding monthly drop-in sessions.
- These sessions can be utilized for any outstanding items, questions, or concerns you may have after attending one of the PSLite to m-Fin Crosswalk training dates.

<table>
<thead>
<tr>
<th>PS Lite to m-Fin Drop in Dates with the mFin Team</th>
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<tbody>
<tr>
<td>Please only attend a drop-in session after attending a Crosswalk training session</td>
</tr>
<tr>
<td>Date</td>
</tr>
<tr>
<td>Thursday, December 3, 2015</td>
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</tbody>
</table>

As always, if you would like to schedule a meeting to discuss questions, concerns, or the project in more detail, please let me know.

Project website: http://www.cu.edu/elevate

Thank you