



Georgia *FIRST* Financials Production
Update WebEX Prod
Wednesday, November 14, 2018



Annual Oracle Maintenance Release 5.40

Release Schedule

FPLAY Database Refresh

Supported Browsers

User Experience Changes

Module Updates and Changes

Preparing for Release 5.40

Calendar Year-End Updates

Q&A

Release will consist of:

Implementation of Single Sign-On

As of 7:00am December 3, 2018

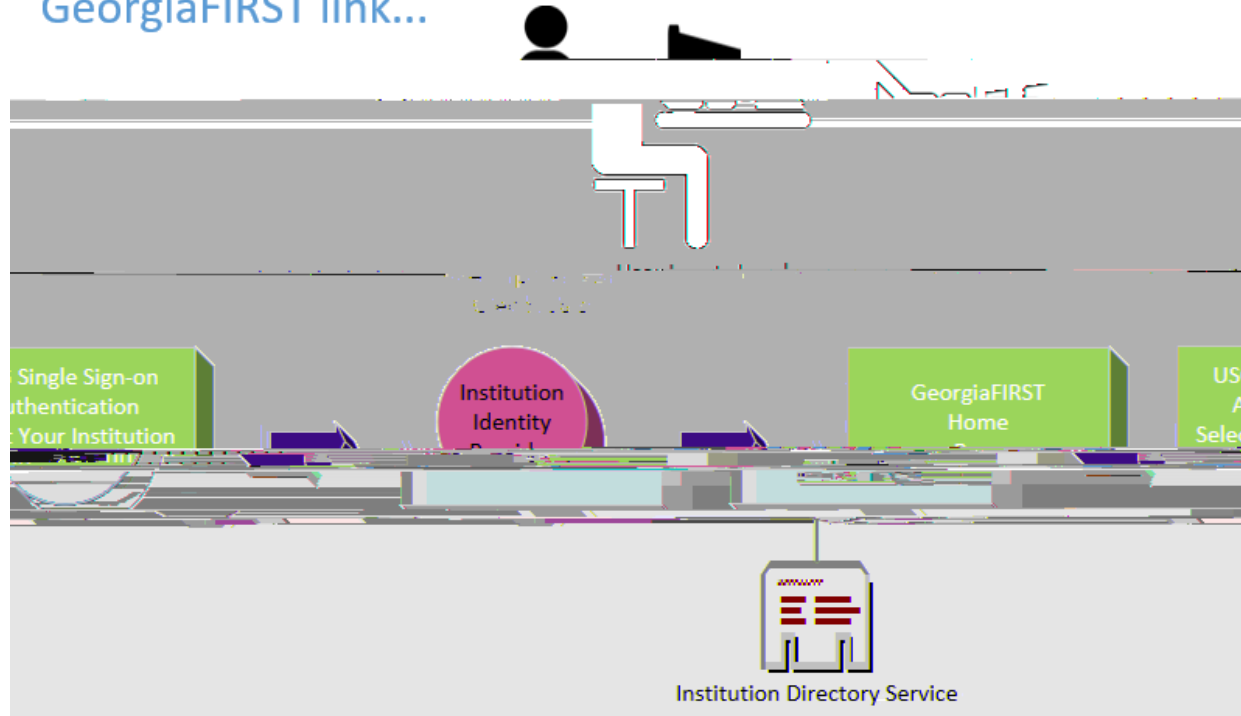
Using the same SSO as OneUSG so no additional setup is needed

Multi-factor authentication

If your institution has implemented a MFA solution, it will work for Financials SSO

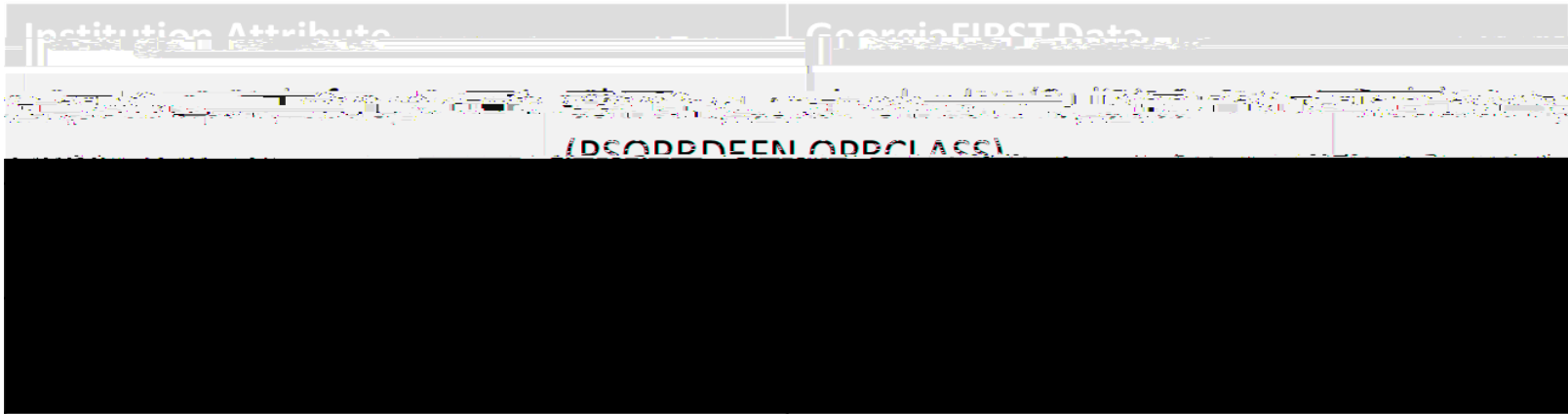
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GeorgiaFIRST link...



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In order for the user to authenticate, the following must match:



Implementation of Single Sign-On

Creating Financial User Accounts

Implementation of Single Sign-On

Access Financials from Georgia *FIRST* Financials website

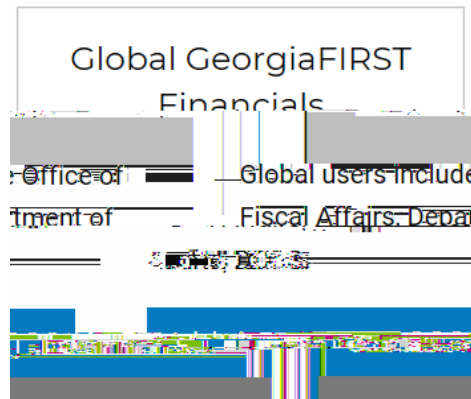
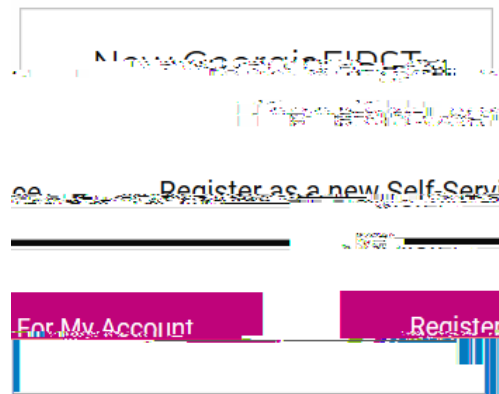
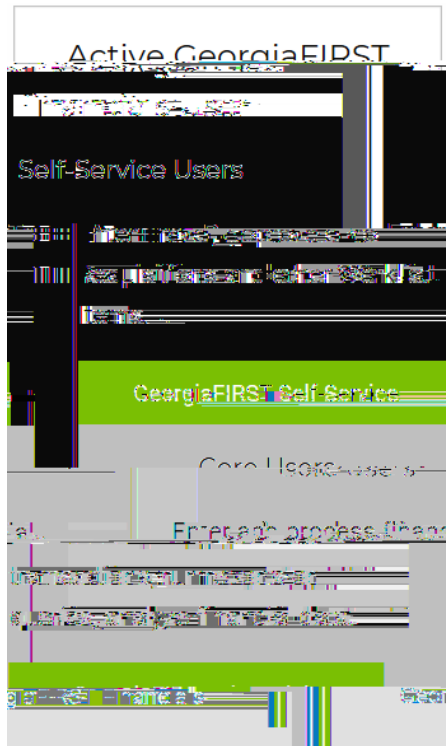
Current browser bookmarks/favorites for Georgia *FIRST* Financials should be deleted.

Create a new bookmark/favorite for

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Implementation of Single Sign-On

Implementation of Single Sign-On

Login button #1 and #2

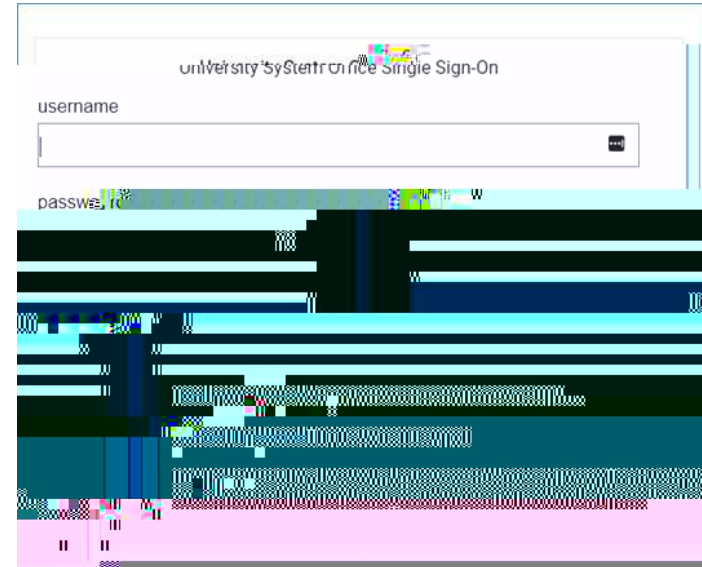
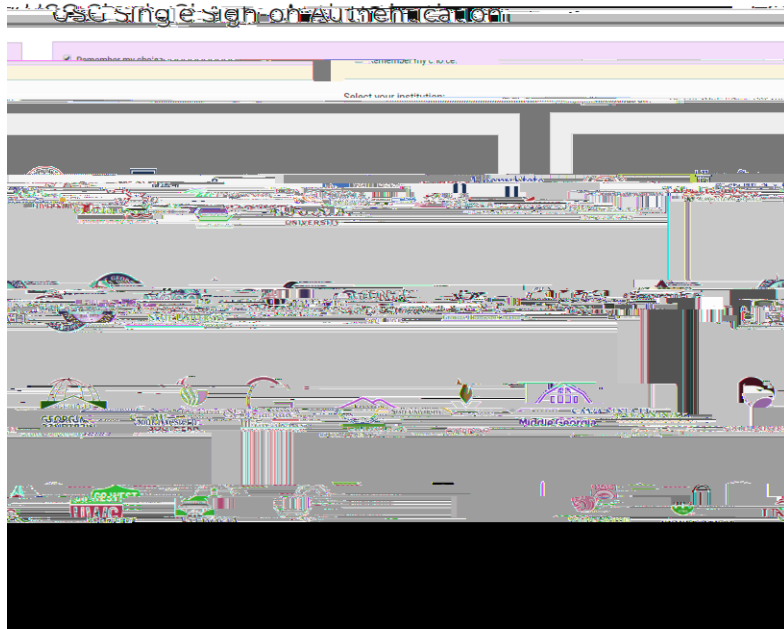
Goes to picker page

Select your institution (logo)

Institutions single sign-on page

Enter single sign-on local credentials (*like you do today for OneUSG*)

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If Institution has implemented multi-factor authentication solution,
a notification will be sent.

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Implementation of Single Sign-On

Goes to Georgia *FIRST* Financials login page

Georgia *FIRST*

Does not use Single Sign-on

Goes to Georgia *FIRST* Financials login page

Enter Financials User ID and password

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Regression Testing

Announcement sent out November 8th

Only applies to institutions using PSQUEST 2-tier access

Testing recommended due to PeopleTools upgrade and table changes

Need to ensure your access to data not impacted

FPLAY Database Refresh Schedule

Plan to refresh FPLAY week of December 10

Will be unavailable approximately 5 business days

Will refresh from current production and apply release 5.40

Will be turning on SSO for FPLAY

Notify kistie.manders@usg.edu if you have users setup for Training that you wish to retain.

Supported Browsers for PT8.56.12

There are no changes for supported browsers.

Issues may still be encountered that include lookups not returning results, buttons not active on the page, etc.

As always, it is best practice to clear browser cache on a regular basis.

Supported Browsers for PT8.56.12

Refer to the following documentation:

Browser Compatibility Guide for PeopleSoft Applications,
PeopleTools 8.53-8.56

Clearing Your Browser Cache Job Aid

[http://www.usg.edu/gafirst-
fin/documentation/category/general_job_aids_and_reference_documents](http://www.usg.edu/gafirst-fin/documentation/category/general_job_aids_and_reference_documents)

PLANNING FOR THE FUTURE

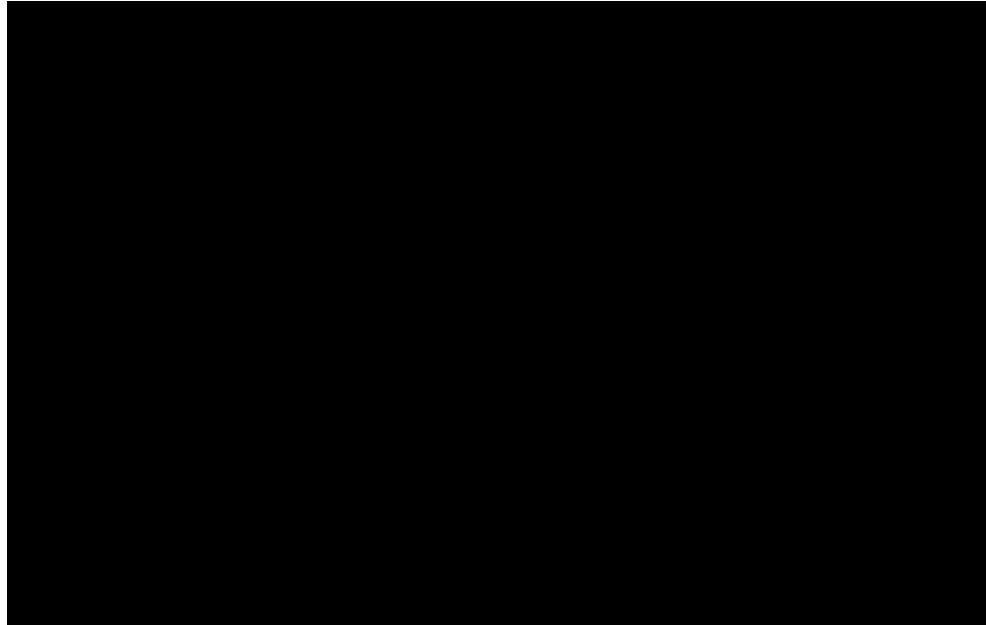
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PeopleSoft Classic Plus User Interface

Classic Plus is a hybrid between existing Classic and Fluid

Slightly bigger
layout

Classic Plus
pages present
in multiple
modules



Homepage Changes

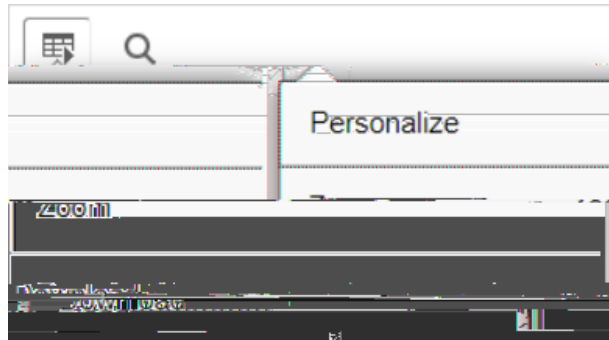
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Changes to Grid Options on Classic+ pages

The options that are currently in upper right hand corner



Now appear in the upper left corner of the grid box



~~Release 10M-1-11-14-2014~~

General Ledger Updates and Changes

Department Manager Dashboard

- Functionality delivered in December 2017 that allows Department Managers to view financial data, including budgets, pre-encumbrances, encumbrances, expenses, and the detail behind these numbers in one place.
- Performance enhancement was needed after the initial release.
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General Ledger Updates and Changes

New Top Supplier Dashboard

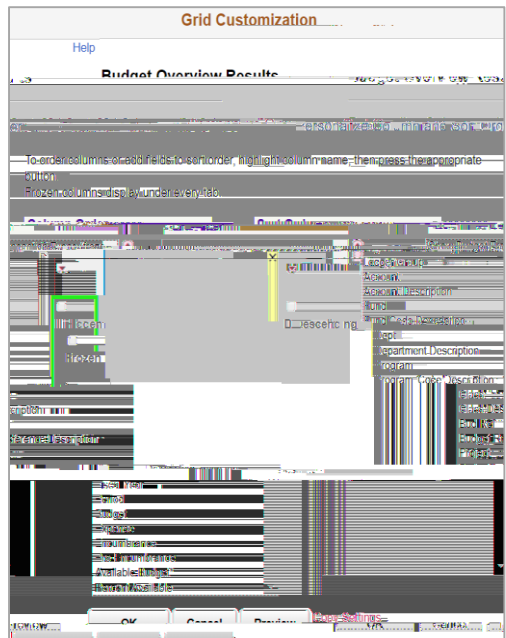
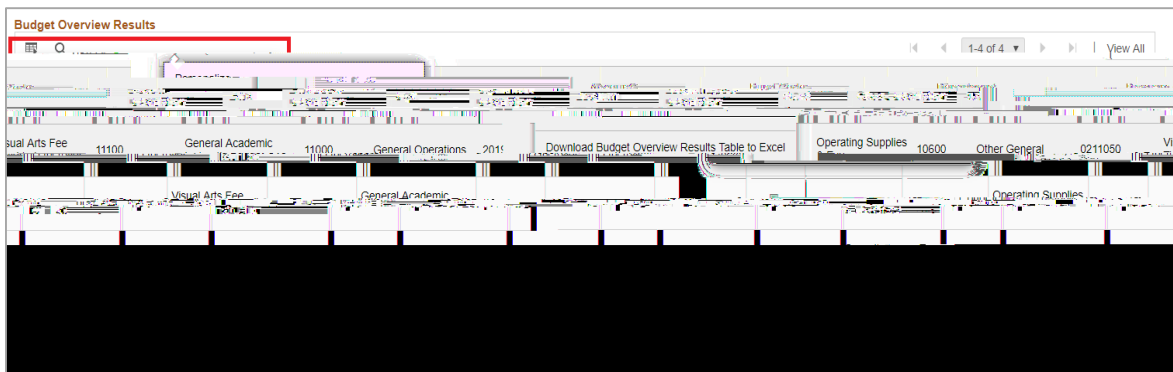
Allows users to view their top supplier activity for a fiscal year

Supplier Dashboard functionality is similar to the Department Manager Expense and Reversals

Budgets Overview Page displays all columns in the results

General Ledger New Known Issue

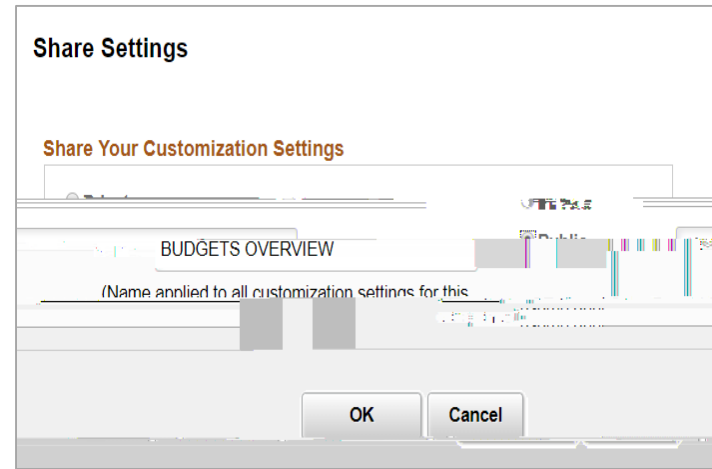
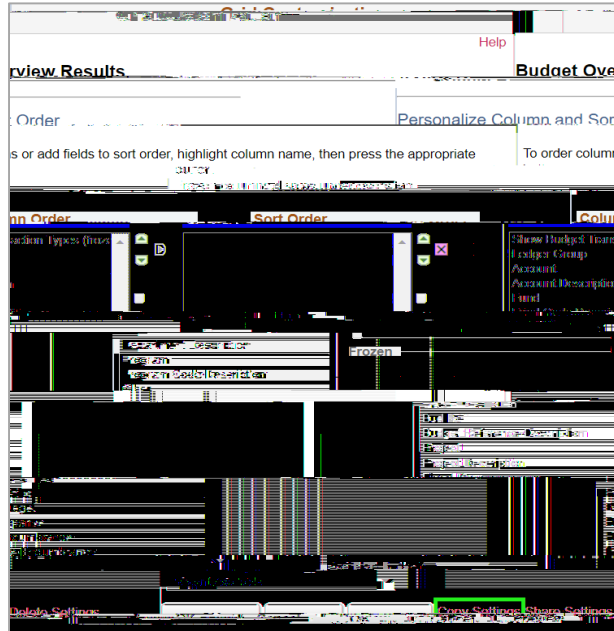
Budgets Overview Page Workaround:
- To personalize preferences:



General Ledger New Known Issue

Budgets Overview Page Workaround:

- ***Budgets Overview*** customized setting available



ePro & Purchasing Updates and Changes

New Option upon Save when Adding or Updating a supplier:

Select Yes to Submit Approval after saving

Select No to Submit Approval later

ePro & Purchasing Updates and Changes

Identifying Information Address Contact Information Classification Customization

Supplier ID NEXT

*Supplier Short Name TESTINGTER

Check for Duplicate

Additional Name

Withholding

Open For Ordering

*Classification Federal

HCM Class Default

Regular

*Supplier Status Unapproved

Yes No Cancel

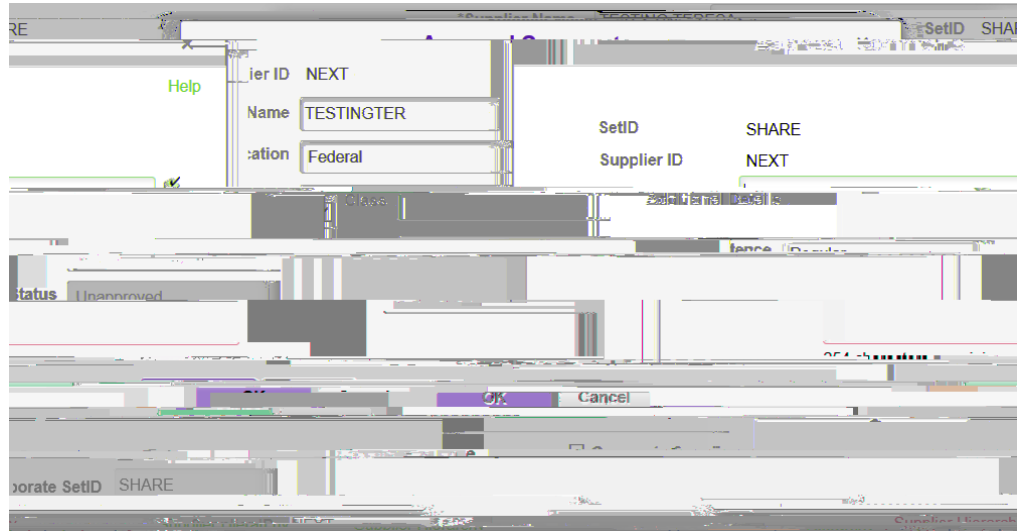
Complete Supplier

Initial Inq Supplier

ePro & Purchasing Updates and Changes

Approval comments, that can be viewed by the Approver.

Comments are not required.



ePro & Purchasing Updates and Changes

the Identifying Information tab.

The screenshot displays the 'Employee Self Service' interface for a supplier. The 'Identifying Information' tab is active. The form contains the following fields and values:

- SetID: SHARE
- Supplier ID: 0000030500
- Short Name: TESTINGTER (with a secondary value TESTINGTER-001)
- Classification: Federal
- HCM Class: (empty dropdown)
- *Persistence: Regular
- *Supplier Status: Unapproved
- *Supplier Name: TES
- Additional Name: (empty)
- *Supplier : (checkboxes)
- *Cl: (checkbox)

Buttons visible include 'Check for Duplicate' and 'Submit For Approval', which is highlighted with a red box.

ePro & Purchasing Updates and Changes

for Approval button.

This opens the Approval Comments box.

Select OK and the supplier will route for approval.

ePro & Purchasing Updates and Changes

Budget Check and Cancel icons returning on Maintain PO page (Add/Update POs)

Employee Self Service | Purchase Order

Maintain Purchase Order

Purchase Order

PO Status: Approved ✕ Business Unit:

Status: Not Chkd PO ID: 0000538151 Budget:

Copy From: Hold From Further Proc

Header ?

*Supplier ID: 0000024768 Mettler-Toledo, LLC Receipt Status: Not Recvd

*Buyer: Julie *Dispatch Method: Print

Dispatch

PO Reference:

Amount Summary ?

Merchandise: 3,840.00

Header Details | Activity Summary

Actions



ePro & Purchasing - Resolved Known Issues

KI9.2-71_PO Unable to Create Amount Only PO via Express Purchase Order page

KI9.2-49_PO Process Option Changes for Maintain Purchase Order and Express Purchase Order pages

KI9.2-40_ePro Account Field Not Editable

Updated:

KI9.2-3 PO Print Run Control Page Number of Copies

Travel and Expenses Preparation for the Release

All Expense transactions should be in Pending or Approved Status prior to release 5.40

Pending = created and saved or sent back to the traveler

Run the **BOR_EX_WF_BLACK_HOLE** query to monitor approvals in process

Travel and Expenses Resolved Known Issues

KI9.2-70_EX – Issues Adding Meal Lines to a Fluid Expense Report Using Quick-fill

KI9.2-72_EX – Incorrect Chartstrings on Fluid Expense Report When Accounting Defaults Changed

KI9.2-73_EX - Creating Travel Authorization from a Template Causes Accounting Details to be Blank

KI9.2-74_EX – Default Creation Method of Copy an Existing Report Causes Javascript Error in Fluid Expense Report

Accounts Payable Updates and Changes

New AP Queries:

BOR_AUDIT_AP_VCHR_ENTRY_ID - Vouchers w/User Entered ID

BOR_AUDIT_AP_VCHR_SINGLEPAY- Vouchers for Single Pay Vendor

Created for DOAS for Single Payment Vendor and Voucher Analysis

Accounts Payable Updates and Changes

New Voucher Upload Spreadsheet:

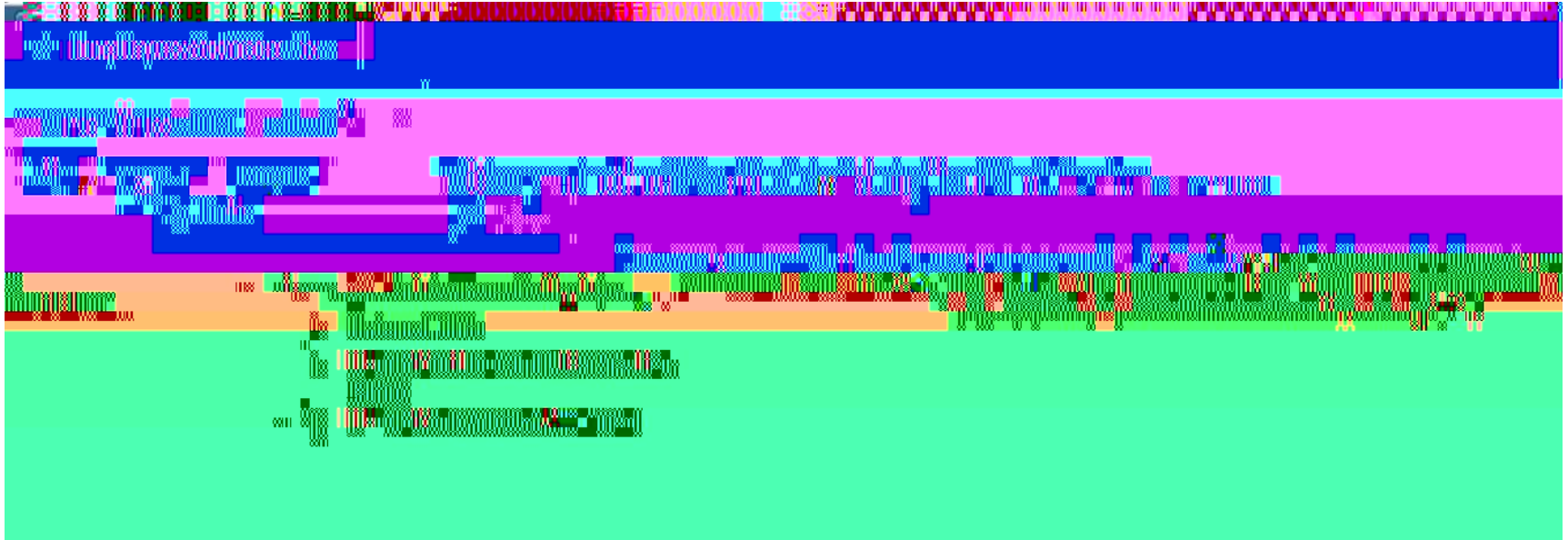
A new version of the Voucher Upload Spreadsheet will be posted to the Georgia *FIRST* website prior to the 5.40 release.

The current version will still work after 5.40.

An announcement and updated job aid will be sent out and posted on the website.

Security Updates and Changes

New Security Administration WorkCenter!



Security Updates and Changes

New Security Administration WorkCenter!

In an effort to help centralize Security Administrators daily activities!

Includes all pages that are accessed as part of your daily security administration duties, as well as helpful queries and reports!

Part two will be coming later, and will include options to personalize the WorkCenter and add favorite queries, reports, or links so you have one place to go and will not have to memorize navigation.

If you have any other suggestions to add to it, send them my way!

Preparing for Release 5.40

How to prepare:

Communicate system downtime

Change Management:

Prepare users for Single Sign-On Changes

ITS will provide a job aid

Have users create bookmark/favorite for Georgia *FIRST* website

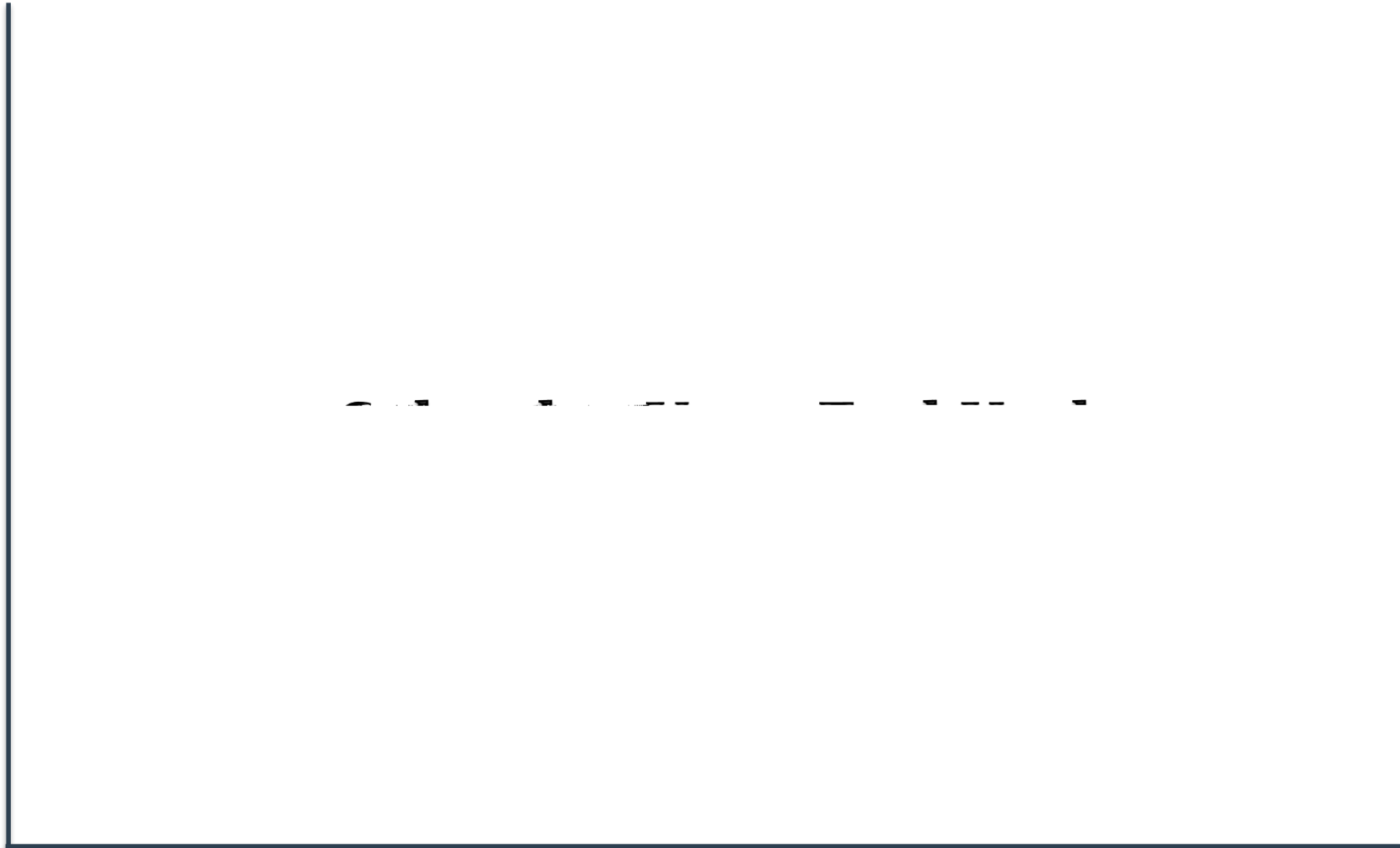
Download new Voucher spreadsheet (optional)

Plan for use of new features

Voucher Fund Workflow setup

Vendor Spend Dashboard

Security Administrator Dashboard



Annual Per Diem Updates (CONUS/OCONUS)

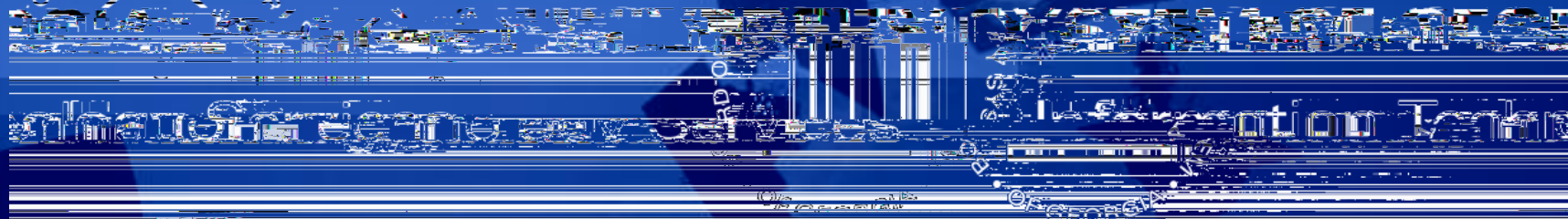
Working on the annual per diem updates

Estimating mid to late November for updates to be applied to production

An announcement will be sent once they are complete

Questions?

AGENTS OF THE UNIVERSITY



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