



8.9 PEOPLESFT FINANCIALS UPGRADE WIMBA FAQs – 5/15/08 Session

Q: What action should we perform if there are departments in our spreadsheet that are no longer relevant to our institution?

A: Step 1: Enter “N/A” in the three fields on the spreadsheet that you would usually update with 7.5 Manager Name, EMPLID, and USERID/OPERID.

Step 2: Update your 7.5 database to show the correct status of the department as inactive.

Q: Can users in Administrator roles be restricted to the performance of only certain tasks?

A: The tasks that an Administrator can perform are limited by the security roles they are granted. For example, an Expense Administrator at one institution may have the security access to post liabilities where an Expense Administrator at another institution does not have this access. Institutions are encouraged to use the security request form to correctly identify the tasks each user (including their administrators) should perform.

Q: Is there any Workflow training available?

A: Workflow will be covered in both the eProcurement and Expenses Super User Training sessions. Additionally, portions of Workflow are covered in UPKs.

Q: What does the Cash Advance Administrator job have to do with Banner feeds and bank statements as mentioned in the Wimba session?

A: The Cash Advance administrator is primarily responsible with reconciling cash advance activity for each institution. For most schools, when a cash advance amount needs repaid to the institution, this deposit is entered in Banner and is fed through to the General Ledger. While the Cash Advance administrator may not be responsible for the Banner or GL duties, he/she should be knowledgeable of the process and how it impacts cash advance reconciliation. Bank statements were mentioned because the same person that currently reconciles your bank statements may be the appropriate user to assume the cash advance administrator duties.

Q: The spreadsheet lookup page has employees who are inactive (and have been for many years). Is there any way we can get a spreadsheet with only active employees?

A: Thank you for this suggestion. It is too late to update the ePro Department spreadsheets that you received earlier this week, however we will re-examine our queries to see if future spreadsheets can contain only active employees.



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Q: Please warn us ahead of time when we may lose connection so that we will know to go back to the lobby.

A: The Wimba tool is relatively new to the PSFIN group. As we become more familiar with this product, and we hear feedback from users, we can better prepare for future sessions.