UR Financials Project

Demo Days

October 2014
Agenda

• Project Update
  – Hands-On Update
• Forms Update
• Monthly Ledger Report update
• Training Assessment and Registration
• Q & A
• Wrap Up
Chatting for WebEx Participants

For those joining the WebEx:

1) Please access the chat feature at the top of your screen

2) Please chat directly with Mike Bonanno (He will then pose the questions on your behalf)

3) Select Mike in the drop down menu in the chat window (do not select “everyone”)
Project Update

• Testing will be complete by end of October
• Workday functionality available and ready for go-live
• Hands On Sessions wrapping up in October
• Training material finalized, moving into preparation phase for training delivery
• Post Go-Live support details in process
Hands-On Sessions - Feedback

• Over 200 individuals have participated in Hands-On sessions. Total of 350 seats were made available

• Initial feedback has been very positive

• No additional Hands-On workshops will be scheduled (why not?):
  – Team is preparing for training sessions
  – Report training to start on November 17th
Hands-On Sessions - Comments

• Random comments from survey:
  – “Additional time/instruction on each report and less "free" time. Thank you!”
  – “Nice relaxed introduction. I feel comfortable practicing on the system and learning more. “
  – “I would suggest you pick up the pace- felt much of it was repetitive from the e-learning module. Thank you- I learned a lot.”
  – “It was fast paced and a little confusing at first, but realize it's a test (hands on meeting now) I understand. Looking forward to 6 hour training class.
  – “The information was presented in a very clear concise manner. It was great to have all the extra helpers!”
Forms Update

• All forms on the UR Financials website are FINAL except for the “Draft” watermark on the PDF

• Videos exist for the following forms:
  – Introduction to Forms (discusses material common to all forms)
  – Employee Expense Report (F3)
  – Request for Payment (F4)
  – Student Expense Report for University Business (F34)
  – Journal Entry (new form)
  – Banking Entry (new form) – In process
  – Purchase Requisition (312) – In process

• Let’s Watch the Employee Expense Report (F3) Video
Purchase Requisition Form (312)

- Purchasing current stock of forms has been depleted
- New forms stock that is on order will be UR Financials FDM but still can be used with FRS Chart of Accounts until January 1, 2015. Flyer will be attached to provide instructions
- Purchase requisition form to be used similar to it’s current use:
  - Internal and external services/goods purchase
- Purchase requisition for NOT to be used (should use new journal entry form):
  - Cost transfers and Journal entries
Training Topics

• Registration
• Non-Company Level (NCL) Class and Schedule
• Signup Genius
• UR Financials Pre-requisites
• Key Training Dates
Training Registration

• Registration for all Core classes will be sent as an email calendar notice

• Registration conducted via Signup Genius tool (similar to Demo Days sign up)
  – Non-Company Level (NCL) Report class registration
  – Registration for “Reporting with Excel” class to be available starting in December
Non-Company Level (NCL) Class

• Non-Company Level (NCL) Report class registration is now active
  – Two options for registration (see course outline):
    • Basic (3 ½ hours)
    • Advance (6 hours)
  – Releasing in blocks (November and December now available). Additional sessions for January and February to be released at the start of December
  – Please respect your registration – we need to have full classes in order to get 950 people through all sessions
  – Cancellations due no later than 48 hours prior to class
NCL Report Training Sessions

• November / December NCL Classes (Block 1)
  – Basics session
  – Basics and Advanced session

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More seats for full day session will be made available!
### Signup Genius

#### UR Financials Non-Company Level Reporting Class

We are pleased to offer this Non-Company Level Reporting class.

**LOCATION:** 315 Science Parkway Building C - Shuttle Service Only, No Parking Onsite

**CREATED BY:** Jim Dobbertin

**CONTACT**

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| 11/17/2014    | **Basic Reporting - AM session only (3.5 hours) (10)**
| (Mon. 8:30AM - 4:00PM) | Please refer to the Non-Company Level course outline found on the UR Financials Training webpage to select your appropriate time slot for this class. |
|               | **Basic + Advanced Reporting - AM and PM (6 hours) (10)**
|               | Please refer to the Non-Company Level course outline found on the UR Financials Training webpage to select your appropriate time slot for this class. |

#### Submit and Sign Up

- Use Signup Genius to register for the NCL Reporting classes
Pre-requisites for UR Financials production access

1. Complete the FRS/COGNOS Security Access form and have signed by supervisor
2. Take and pass the “Introduction to UR Financials” eLearning class
3. Take and pass the required classes
4. All certification exams will be administered in the Blackboard application and can be taken twice. 8 out of 10 questions must be answered correctly
## Key Training Dates

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<tr>
<td>• Training content build</td>
<td>• Training Dress Rehearsals</td>
<td>• NCL Reporting class commences on November 17\textsuperscript{th} at Science Park</td>
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<th>December</th>
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<td>• Core classes conducted</td>
<td>• NCL and Reporting with Excel classes conducted</td>
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<td>• January/February NCL Reporting class registration available</td>
<td>• Post Go-Live Support call in sessions</td>
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Communications

• Updates to web
  – UR Financials Survey
  – Registration for the Non-Company Level Reporting Classes
  – Depositor SIG meeting with WebEx 9/23/14
Q & A
Wrap Up: Demo Days

• Change Readiness Survey – please complete before Friday, October 31st

• Please complete the Demo Days survey that will be sent out on Monday morning

• Demo Days next month will be **November 19,20,21**

• Potential Topics for upcoming Demo Days
  – General Updates
  – Forms
  – Reporting
  – Training
  – Data Conversion and Validation
  – Cut-Over Plans

• Please continue to reach out with questions and share project information with your Department