GHSU Name Change Implementation

The Business Unit name was changed in PeopleSoft Financials as of February 1, 2011. This change corrected the following reports to display the institution’s new name (Georgia Health Sciences Univ).

1) Requisition Print
2) PO Print
3) All PeopleSoft delivered reports (Budget Transaction Detail, Budget Status, etc.)
4) Accounts Payable checks and check copies

PeopleSoft Financials Training Opportunities

~You can register for these classes through HR Training.~

Delivered Reports & Inquiries: 2:00-3:30PM - 3/8/2011
Basic Query: 9:00AM-Noon - 2/23/2011
Advanced Query: 9:00AM-Noon - 3/22/2011
Business Manager and Administrative Staff Lunch and Learn Series

~You do not have to be a PS Financials User to attend~

Based on the results of the Morehead Faculty Satisfaction Survey conducted in 2008, the Departmental Administrative Support Staff Training team has been asked by Dr. Azziz to develop quarterly training for Department Business Managers and Administrative Support Staff in the following areas:

- Human Resources
- Finance, Controller’s Division
- Materials Management and Budget, Planning & Analysis
- Research Administration for business managers and administrative staff

The quarterly training "Lunch and Learn" series will focus on:

- Process navigation
- Forms completion
- Explaining the “why” behind many requirements and policies

The second Human Resources session will be offered on Tuesday, March 1, 2011 in EC-1222 from 11:00AM – 1:00PM. Lunch will be provided fee-of-charge. Registration is required. Please register at: https://www.oacs.mcg.edu/hr/training/CourseDetails.asp?courseid=303

At this link, you can also register for the other sessions. There will be two sessions offered for each support area.

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Email Messages Coming From PSADMIN May Contain Budget Checking Error Information

Accounts Payable and Purchasing staff have been starting to send PeopleSoft Financials users email notifications when they receive a budget checking error processing departmental purchase orders and AP vouchers.

If you receive one of these emails, it will be from the PSADMIN user, and it will contain a message from the staff member regarding the error, and a URL link. If you click on the link, you will be directed to log into PeopleSoft Financials, and will be directly taken to the PeopleSoft page that explains and shows the error message.

You can see an example of the page below.

**NOTE:** If you click on the Go To... icon, then you will be taken to a Budget Inquiry of your CFC, which will show your Available Budget.
MATERIALS MANAGEMENT - PURCHASING

Have you heard? GA Health eShop is coming.........TO ALL PEOPLESOFT FINANCIALS USERS!!

Who can use GA Health eShop?

GA Health eShop can be used by both “shoppers” and “requisitioners”.

“Shoppers” are those employees who would normally develop a list (usually handwritten) of items to be purchased, i.e., researchers, faculty, etc.

“Requisitioners” are those employees who currently enter requisitions in PeopleSoft to purchase goods and services for your department.

Shoppers, using the point and click of their mouse, are able to create a list of items for purchase from a vendor’s catalog. By selecting an item from the vendor’s catalog, a shopping list is created and will automatically include the item description, unit of measure, price and NIGP Code. This information will no longer have to be selected and entered manually.

Requisitioners can create a PeopleSoft Requisition from the “shoppers” shopping list of items to be purchased. The information from the shopping list will automatically populate the requisition. The requisition header information is the only information that requires manual entry (CFC, Buyer, due date, delivery location and comments).

Any employee, whether on campus in Augusta or offsite in Athens, Savannah, etc, who currently has access to PeopleSoft will have access to GA Health eShop.

If you have any questions, do not hesitate to call Greg Woodlief at 1-2213 or Regina Hull at 1-2986.

GA Health eShop Information Sessions

February 21, 2011  2:00-4:00pm      BC1040
February 23, 2011  2:00-4:00pm      BC1040
February 28, 2011  2:00-4:00pm      BC1040
March 1, 2011      9:00-11:00am     BC1040
Common Requisition Error’s

1. To avoid budget checking errors check all CFC information on all requisition lines.

2. E-mail notification is sent regularly during the month as frequent reminder that requisitions are still pending for varies of reasons. These requisitions need your attention.

3. Please cancel all requisitions that are no longer needed by contacting Greg Woodlief at 1-2213.

4. Please deny all requisition lines if you are an approver, regardless if the other lines on a requisition have no errors.

Updating Information on Chart of Account Department Maintenance Request Form & Departmental Authorization Signature Form

1. These forms work together you can't update one without the other. (i.e., If you have a new department manager on the COA Dept. Maint. Form, then a new Dept. Authorized Signature Form will also need to be filled out.)

2. Common reasons to update forms are when employee leaves, retires, or transfers and they approve requisitions for your department. Please have your forms updated to avoid requisition delay.

3. Department Name and/or Department Manager changes please update BOTH forms.

4. New Manager or departmental approvers please update forms.

Note: Submissions of a new Dept. Authorized Signature Form will void all previous authorization forms.

PeopleSoft Security Access Reminder

If a certain amount of time has passed and you requested PeopleSoft security access for an employee in your department and access has still not been granted. Please contact security administrator at 1-0018 to make sure your security form was received.
Running Reports in PeopleSoft Financials

Comprehensive Financial Report:
- When running the Comprehensive Financial Report, do not run several at the same time especially if they use the same department ID or project ID. If you do this, then each report is in “competition” with each other. It will slow down the processing of each report, and also slow down processing for other users in PSFin. This is a very intensive report in processing, and that is why it needs special care in running it.

Other Reports:
- Except for the Comprehensive Financial Report, most reports only take a few minutes or less to run. If you are running a Budget Transaction Detail, Budget Status or Grant report, and it takes longer than a few minutes, then there may be a problem with your Run Control (criteria page). Check your Run Control page, and see if you notice a problem, i.e., no budget reference specified, no account range, etc. If you cannot determine the problem, please print screen your page and mail it to Tina or Janice, so that we can help diagnose the problem.

Item Commodity Codes
Periodically, new item commodity codes get entered into PeopleSoft Financials. If you need a new listing of these codes, you can run a public query called: MCG_FIS_ITM_CAT_TBL. This query will list the Commodity Code, Description, Asset Profile ID and Account associated with the Commodity code.