What's New in GFS

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Agenda

- "Hard Commitments" on Expenditure Statements
- Worklist changing to Workflow in Axess
- Exception Reporting in GFS
- PeopleSoft Version 9 project on the horizon

Hard Commitments

Worklist is now Workflow!

- All approval functions that are now managed at http://worklist.stanford.edu will be moving to http://axess.stanford.edu
- Nothing changes in GFS; HDA/Financial Approver roles and how approvers are assigned
- Email notifications will be the same except the link to worklist will be changed to Axess

http://axess.stanford.edu

- Once you've clicked on Workflow Home, you're presented with information that is much like the current worklist

- Pending Requests listed for Originators

Slide 1 (screenshot)

| 1066 | d3u7000001v2 | 1005954 | 1 | BADFO | SVEA | 51975 | TU_ONLY | 4605.00 | 04/04/2006 | 06/14/2006 |

Aid Type: TAL 002

Ident: Kenny **Disb Terms:** Qtr Smr **Total Award:** 0.00 **Assist Type:** RA **Assist Hours:** 30.00 **Pay Org:** RAAA **Line/Appr Status:** Complete / Approved

Term	Item Type	Project	Task	Award	TOO	Expend Type	Charge Priority	Amount	Payline Start Date	Payline End Date
1068	890000000008	1020351	3	AABNI	ZZYA	51975	TU_ONLY	1262.00	06/27/2006	08/19/2006
1068	832000004832	1085950	607	TOACT	SVEA	51975	TU_ONLY	2343.00	06/27/2006	08/19/2006

Aid Summary   View All First ◄ 1 of 3 ► Last

	Total Amt	1072 06.07 Aut	1074 06.07 Wtr	1076 06.07 Spr	1078 06.07 Sum
Home Department:		MECHENGR	MECHENGR	MECHENGR	MECHENGR
TAL Category		ENGR	ENGR	ENGR	ENGR
Units Taken:		10.000	10.000	9.000	0.000
STP	984.00	328.00	328.00	328.00	0.00
AST	21366.00	7122.00	7122.00	7122.00	0.00
Total STP + SAL	22350.00	7450.00	7450.00	7450.00	0.00
TAL	22860.00	7620.00	7620.00	7620.00	0.00
TUT	0.00	0.00	0.00	0.00	0.00
Total TAL+TUT	22860.00	7620.00	7620.00	7620.00	0.00

Approve   Return   Decline   Email to Originator   Back to Workflow Home

Slide 2

Workflow Recap

- Transition date is April 23, 2007
- Pending transactions that are less than 6 months old will be transitioned to the new Workflow (although you may want to make sure they are approved in advance)
- Functionality is not changing!
- The new system will be more stable and provides a better platform for future enhancements
- Announcements will be sent to gradfinsupport and gfsfinancialapprovers lists
- New Job Aids will be published

Slide 3

Exception Reporting

New Tools to find exceptions more easily

Slide 4

Exception Reporting in GFS

- Since GFS first went live in PeopleSoft there has been a recognized need for an easier way to find "exceptions"
- Began working with developers last spring to identify situations where reports are needed and a format for the reports
- Thanks to all who have had a part:

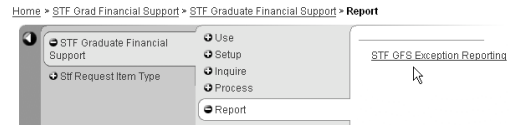| Al Murray	Olgalydia Urbano-Winegar
Ann George	Priscilla Fiden
Kelly Wright	Roni Holeton
Lola Enriquez	Sally Gressens
Nancy Aguilar	Valerie Kiszka

GFS Exception Reporting Overview

- Goal has been to create a tool to help you do your job more easily; not to create new work for you
- Each department manages the work load in their own way; reports need to be flexible
- New reports are in PeopleSoft – not in ReportMart
- Accessible to all with GFS access; most helpful to Home Department Approvers
- ReportMart1 Reports are still available for searching by PTA, Originator, Acad Org

Using the GFS Exception Reports

PeopleSoft®

Home > STF Grad Financial Support > STF Graduate Financial Support > **Report**

STF Graduate Financial Support	Use	
	Setup	STF GFS Exception Reporting
Stf Request Item Type	Inquire	
	Process	
	Report	

- Navigate to GFS > Report > STF GFS Exception Reporting
- Reports are refreshed nightly

There Are Thirteen Reports

Home > STF Grad Financial Support > STF Graduate Financial Support > Report > STF GFS Exception Reporting

STF GFS Exception Reporting

Find an Existing Value

Aid Year: 2007
Exception:
Term:
School Code:
Academic Organization:
Allow Exception:

[Search] [Clear]

Aid Entered but not Term Activ
Ast hrs=16hrs/term or Tot>20
Disbursement Sequence Override
Enrolled with < 8 Units
Foreign Students > 20 Hrs
Home Org<>Term activation
No units enrolled
TAL Awd<>TAL Rate, Amt Ovr
TAL Cat<>Billing Car Tut grp
TAL has an Allocation Override
TAL without Assistantship
Tut Mismatch-Billed and Paid
US Studs > 8 Hrs in Payroll

You can be specific about the population you are interested in searching for:

STF GFS Exception Reporting

Find an Existing Value

Aid Year: 2007
Exception: Aid Entered but not Term Activ
Term: 1072
School Code: ENGINEER
Academic Organization: BIOENGR
Allow Exception:

[Search] [Clear] Basic Search

You are presented with a list of all students who met the criteria entered on the Search Page

STF GFS Exception Reporting

Exception: Aid Entered but not Term Activ **Status:** All Exceptions

Aid Year: 2007 **Term:** 1072 2006-2007 Autumn **Acad Org:** BIOENGR

School Code: ENGINEER School of Engineering

Total number of students: 1 [Generate Report]

Exception Data

Student ID	Name	Last Disbursement Date	Program Action	Action Date
05280522	Stanford, Leland	09/15/2006 8:49:45PM	COMP	06/21/2006

[Save] [Return to Search] [Next in List] [Previous in List]

Scrolling to the right…

View All First ◄ 1 of 1 ► Last

n	Action Date	Fellowship Stipend	Fellowship Tuition	Assist Salary	Assist TAL	Ignore Exception
	06/21/2006	7203.00	1990.00	0.00	0.00	☐

"Allow Exception" and making notes

- There are some situations in which something that is an "error" that must be fixed for one student may be acceptable for another student

View All First ◄ 1 of 1 ► Last

Assist TAL	Ignore Exception	Comments
0.00	☑	Comments

- There are other situations in which University Policy must be followed

- This function will be especially useful for departments where more than one individual will be using these reports

Comments link allows you to save notes

- Checkmarks and comments are saved as long as the underlying data hasn't changed

Comments

Last Updated By: Date of last update:

Comments:

[OK] [Cancel]

- If a piece of information changes for the student you must review again

- "Allow Exceptions" allows you to filter those previously reviewed out of the report

Generate Report Allows Download to Excel

- For use by those who want to further manipulate the data
- Also useful for saving "snapshot" of status at any given point in time

- Clicking "Generate Report" causes an unformatted excel spreadsheet to open in a new window
- You can format, sort and save the report as you wish

The Thirteen Reports are:

1. **Aid Entered but not Term Activated** – Helpful in alerting you to the situation where aid has been entered for future terms but the student is no longer active
2. **Total Assistantship Hours equal 16 per term or are greater than 20** – Alerts you to potential policy conflicts
3. **Disbursement Sequence Override** – Displays basic information about disbursement overrides that have been granted for a specific term

List of Reports continued…

4. **Enrolled with Less Than 8 Units** – Lists students with completed/approved aid lines who are enrolled but in less than 8 units for a specific term
5. **Foreign Students Greater Than 20 Hours** – Identifies international students who are working more than 20 hours per week based on Payroll data
6. **Home Org Not Equal Term Activation** – Identifies students whose Home Org on Aid Year Activation does not agree with data in the student's record
7. **No Units Enrolled** – Lists students with completed/approved aid lines who are not enrolled

And More…

8. **TAL Award Not Equal to TAL Rate, Amount Override** – Lists students who have a TAL award not equal to the TAL Rate per their TAL Category where an override exists
9. **TAL Category Not Equal to Billing Career Tuition Group** – Identifies students who potentially have been over or under awarded tuition
10. **TAL has an Allocation Override** – Useful for identifying cases where the TAL Allocation Override has been used

Finally…

11. **TAL Without Assistantship** – Identifies cases where salary has been cancelled but TAL has not
12. **Tuition Mismatch**; **Billed and Paid** – Creates a list of students where the tuition bill does not equal the amount covered by aid completed and approved in GFS
13. **US Students Greater Than 8 Hours in Payroll** – Allows you to identify situations where a student with assistantship appears to be working elsewhere on campus

Exception Reporting Recap

- Expected to be available to all GFS Users by the end of April
- A detailed Job Aid will be made available at the same time
- Announcement will be made via gradfinsupport

GFS Advisory Group Membership

PS Version 9
- Discovery project is just beginning
- Earliest implementation would be August 2008
- GFS Advisory Group will be involved
- No plans for major changes to GFS; look and feel/navigation improvements

Al Murray	Post Doc Office/Med
*Allison Baird-James	Controller's Office
*Ann George	Dean of Research
Colleen MacDonald	GSB
*Karen Cooper	Financial Aid
Kelly Wright	Payroll
Nancy Aguilar	Financial Aid
Rania Sanford	Education
Roni Holeton	H&S
Sally Gressens	Engineering
Tara Ilich	Earch Sciences
TJ Janeway	SFS

*GFS Owners

What's New in GFS

Questions?