What’s New in GFS

Karen Cooper, Director of Financial Aid
Allison Baird-James, Controller’s Office

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
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 gradfin_support and gfsfinancialaprovers lists
• New Job Aids will be published

Exception Reporting

New Tools to find exceptions more easily

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:

<table>
<thead>
<tr>
<th>Al Murray</th>
<th>Olgyaldia Urbano-Winegar</th>
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<tbody>
<tr>
<td>Ann George</td>
<td>Priscilla Fiden</td>
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<td>Kelly Wright</td>
<td>Roni Holten</td>
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<td>Lola Enriquez</td>
<td>Sally Gressens</td>
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<td>Nancy Aguilar</td>
<td>Valerie Kiszka</td>
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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

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

There Are Thirteen Reports

- STF GFS Exception Reporting
- Find an Existing Value

<table>
<thead>
<tr>
<th>Field</th>
<th>Values</th>
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<tbody>
<tr>
<td>Term</td>
<td>2007</td>
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<tr>
<td>Exception</td>
<td>All Dissatisfied and Term. Acts</td>
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<td>Term</td>
<td>107</td>
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<td>School Code</td>
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</tr>
<tr>
<td>Academic Organization</td>
<td>BUSINESS</td>
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You can be specific about the population you are interested in searching for:
You are presented with a list of all students who met the criteria entered on the Search Page

Scrolling to the right…

“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
- 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
- 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

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

<table>
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<th>PS Version 9</th>
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<tbody>
<tr>
<td>Discovery project is just beginning</td>
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<tr>
<td>Earliest implementation would be August 2008</td>
<td></td>
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<tr>
<td>GFS Advisory Group will be involved</td>
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<tr>
<td>No plans for major changes to GFS; look and feel/navigation improvements</td>
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<thead>
<tr>
<th>Al Murray</th>
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<tr>
<td>Ann George</td>
<td>Dean of Research</td>
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<td>Colleen MacDonald</td>
<td>GSB</td>
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<td>Karen Cooper</td>
<td>Financial Aid</td>
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<td>Rania Sanford</td>
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<td>Rosi Holton</td>
<td>H&amp;S</td>
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<td>Sally Gressens</td>
<td>Engineering</td>
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<tr>
<td>Tara Ilich</td>
<td>Earth Sciences</td>
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<td>TJ Janeway</td>
<td>GFS</td>
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*GFS Owners
What’s New in GFS

Questions?