

Getting ready for the new Chart of Accounts and FINS 9.2

Date: May 24, 2016
email to Finance and Community Stakeholders

Purpose of this email

At the May 5th Finance and Community Stakeholder meeting, attendees participated in an Idea Exchange discussion session. Participants joined one of three groups, Faculties, Administration or Finance to brainstorm tasks needed to prepare their area for the changes within their departments from the new Chart of Accounts and FINS 9.2 Upgrade.

Attached to this email is a spreadsheet that contains the tasks identified in the individual groups.

Spreadsheet content

The attached Excel spreadsheet contains three worksheets accessed using the Worksheet tabs:



Within each worksheet the tasks have been organized into categories. For example:

- Departmental Form changes
- Department reports
- Tools (cheat sheets, queries, spreadsheets, documentation etc.)
- People (training, communications, etc.)

The worksheets are organized in a way that your area can build your departmental readiness plan. There are columns for:

- ▶ Task descriptions
- ▶ Who is responsible for the task?
- ▶ When is the task due to be completed?
- ▶ Status of task: new, in progress, complete, etc.
- ▶ Comments related to the task.

**How can
you use this
information?**

Internal departmental discussions should be scheduled to flush out the worksheet relevant to your area to create a working plan to prepare your departments for go live. Add additional categories and tasks if needed, determine who will complete each task, by when, and keep track of the status as you complete the tasks. For example, you may want to list all the impacted spreadsheets to be updated, or any internal documentation that needs to be revised.

**What if we
need help
getting
started?**

The project will help anyway we can. If you would like help facilitating a planning session or conducting a workshop to better understand impacts, please email FPINFO@sfu.ca.

The project will continue to provide communications to you and in May 2016 begin distributing communications to all users on the FAST mail list to reach as many people as possible, and we will develop online training for both Community and Finance Department FINS and FAST users.

Let us know

Please email FPINFO@sfu.ca and let us know if the spreadsheet can assist you or if you will be managing the impacts to your department in another way.