



FRANCIS MARION UNIVERSITY

ERP IMPLEMENTATION MEMORANDUM

To: Colleague Finance End-Users

From: Thomas Welch, CPA, Assistant VP for Financial Services

Date: January 18, 2018

Re: Colleague End-User Update – January 2018

For all those that are currently using the University’s new Colleague Finance System to conduct business, let me thank you for your patience and cooperation during this implementation period. It is the hope of the Finance Implementation Team that our product is one that will streamline administrative processes, improve decision making, and reduce department administrative costs.

As we continue the implementation, we will be training the last of our end-users over the next three weeks. We will then move on to our implementation of our Synoptix reporting system, which will be the capstone of our initial implementation efforts. While implementation is a slow process, a few features have been implemented with several others to follow in the next few weeks that I want to highlight at this time.

Travel Pooling - Implemented:

On January 12, 2018, the Office of Financial Services put in place travel pooling which allows your travel budget line items to pool into one budget line item as we have historically presented it in the legacy system. As can be seen below, the gray lines represent the “P”oolee accounts that total to the travel pool account (or “U”mbrella Account).

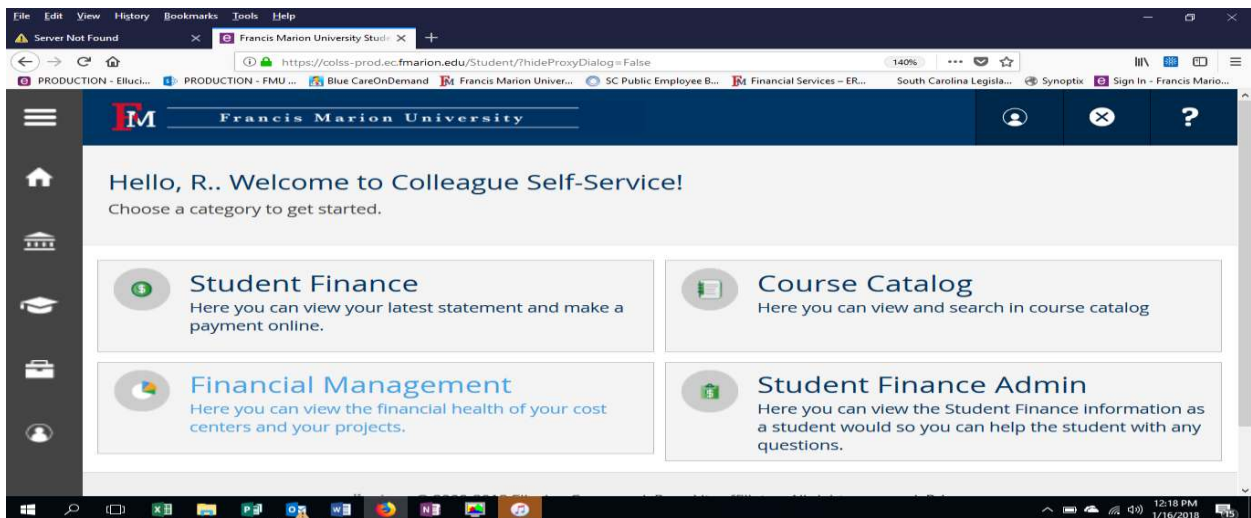
Account Number	Description	0.00	0.00	0.00	0.00	0.00
100000-64300-70500	General : Financial Services : Employee Waiver	0.00	0.00	0.00	0.00	0.00
	Gl.class Total	0.00	0.00	0.00	5,766.04	5,766.04-
100000-64300-80000 U	General : Financial Services : Travel Pool - Reg	1,700.00	0.00	0.00	557.22	1,142.78
100000-64300-80003 P	General : Financial Services : In-State - Lodging	0.00	0.00	0.00	229.52	
100000-64300-80004 P	General : Financial Services : In-State - Meals	0.00	0.00	0.00	31.00	
100000-64300-80005 P	General : Financial Services : In-State - Mileage	0.00	0.00	0.00	71.70	
100000-64300-80006 P	General : Financial Services : In-State - Registration	0.00	0.00	0.00	225.00	
100000-64300-81000	General : Financial Services : Contractual Services	0.00	0.00	0.00	0.00	0.00
100000-64300-81018	General : Financial Services : Technology Fees	0.00	0.00	0.00	0.00	0.00

Self Service – In-Progress:

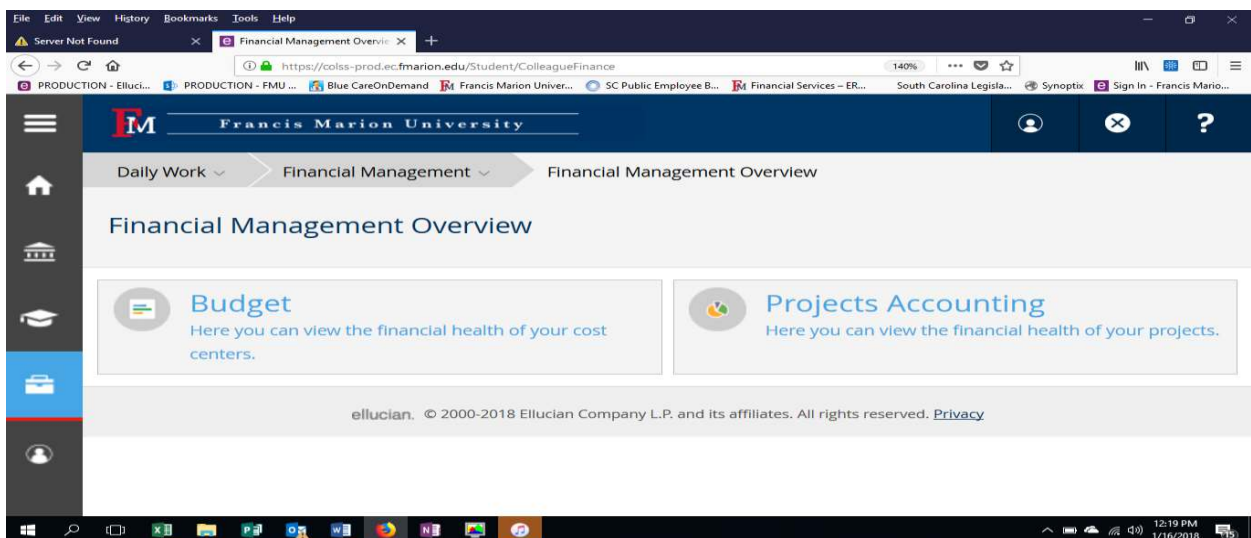
The Finance Implementation Team is currently setting up Self-Service, which is a Colleague solution that will be assisting us in viewing budgets as well as project accounts. Self-Service will eventually replace the budget selection and budget summary functions we currently use in the Patriot Portal. We are working with Ellucian to have a link to our Self-Service website installed on the Portal but until then, you may access this new feature by going to the following: <https://colss-prod.ec.fmarion.edu/Student/Account/Login>. If at the time of this memo, you do not have access to Self-Service, please continue to check to see if we activate your account. If you have not been activated to use Self-Service by February 2nd, please contact me at rwelch@fmarion.edu.

Instructions for using Self-Service is as follows:

After logging in, click on Financial Management.



Then you can use Budget to review non-project related accounts or Project Accounting to review your project related accounts.



Transaction Support Document Imaging – Implementation Planning:

With the new system, we know that providing support documentation for your transactions has been difficult. The Finance Team is currently working with IT on a solution to allow end-users the ability to electronically submit this information to Purchasing and Accounts Payable. We hope to release information on how this will be streamlined within the next two months.

Synoptix Reporting – Implementation Planning:

FMU's Synoptix reporting system will allow users to print presentation ready account reports as well as generate and email month-end reports. Once we have all of our end-users in this system, we will begin working to provide month-end reports for all months we have been unable to provide such for thus far. These reports will mimic our prior system reports. If you have any recommendations for modifications to the old report format please let us know at rwelch@fmarion.edu.

We Need Your Feedback:

If you have any feedback on how the system is working, we would love to hear it. Remember to continue to look at our ERP website as we continually update this with forms and other information that you need to know.

I wish you the very best and again, thank you all for your patience and support as we continue our implementation.