

# GeorgiaFIRST Financials Website

The GeorgiaFIRST Financials website is the central repository for all information regarding PeopleSoft Financials for GeorgiaFIRST institutions. Users can access all of the pages from the GeorgiaFIRST Financials homepage.

The GeorgiaFIRST Financials homepage contains links at the bottom of the page that allow you to navigate to the latest Announcements and Known Issues, as well as related links such as the Business Procedures Manual.

The menu bar on the left side contains links to Documentation, Announcements, Known Issues, Releases, Project Information, Training, iStrategy/Reporting and Support.



The screenshot shows the GeorgiaFIRST Financials website homepage. At the top, there is a header with the GeorgiaFIRST logo and the text "Information Technology Services". Below the header is a main heading: "Delivering Trusted Financial Management Solutions".

On the left side, there is a navigation menu with the following items:

- Home
- Documentation +
- Announcements
- Known Issues +
- Releases +
- Project Information
- Training +
- iStrategy/Reporting +
- Support

The main content area contains the following text:

PeopleSoft Financials was implemented at the teaching institutions of the University System of Georgia, along with the University System Office (USO), under the project name "GeorgiaFIRST" in January 1998. The GeorgiaFIRST PeopleSoft Financials application model is a fully integrated, Oracle-based technology suite of software applications managing the financial data that meet BOR and USG institutional needs for information used in decision-making. The single application model and a consolidated database containing the data for all institutions are centrally hosted at ITS, and ITS distributes all software upgrades and releases. This web site provides information relevant to the model application, including business processes and changes or updates to the model, as well as many informational aids and tips.

Some pages in this site contain proprietary information and are restricted to University System of Georgia personnel. To obtain a user name and password, contact the ITS Helpdesk.

[Latest Announcements](#)

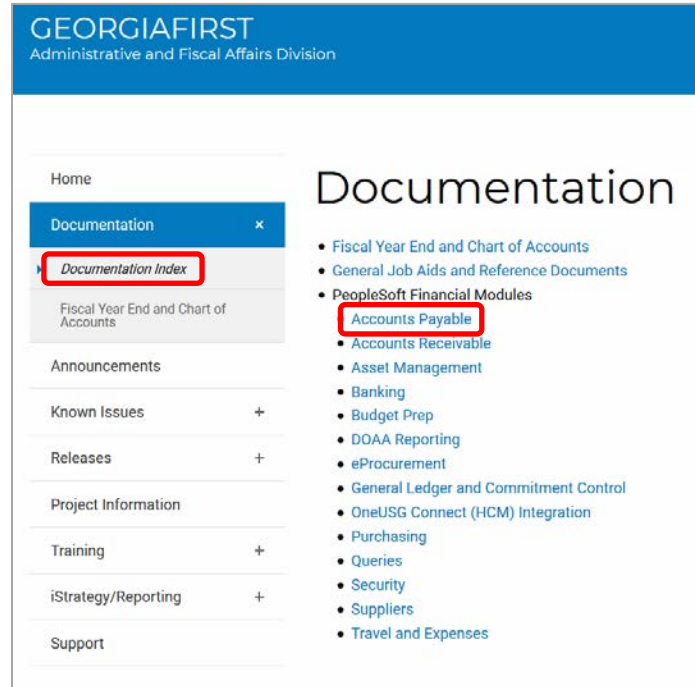
Find the latest GeorgiaFIRST information about announcements concerning new or updated documentation, relevant system-wide changes, recent and upcoming releases, database changes, and more.

[Latest Known Issues](#)

On the right side, there is a "Subscribe to our mailing list" section. It includes the text: "This list is intended for all customers of the GeorgiaFIRST PeopleSoft Financials application. If you are a Budget User responsible for creating/maintaining budgets at your institution, please click the radio button at the bottom of this form to also sign up for the first-lb@listserv.uga.edu listserv." Below this text is a form with a radio button and a text input field for "Email Address \*".

## Documentation

The Documentation page is composed of documents and videos relevant to each module. To see resources in a particular module, click on the Documentation Index and then click on the module.



**GEORGIAFIRST**  
Administrative and Fiscal Affairs Division

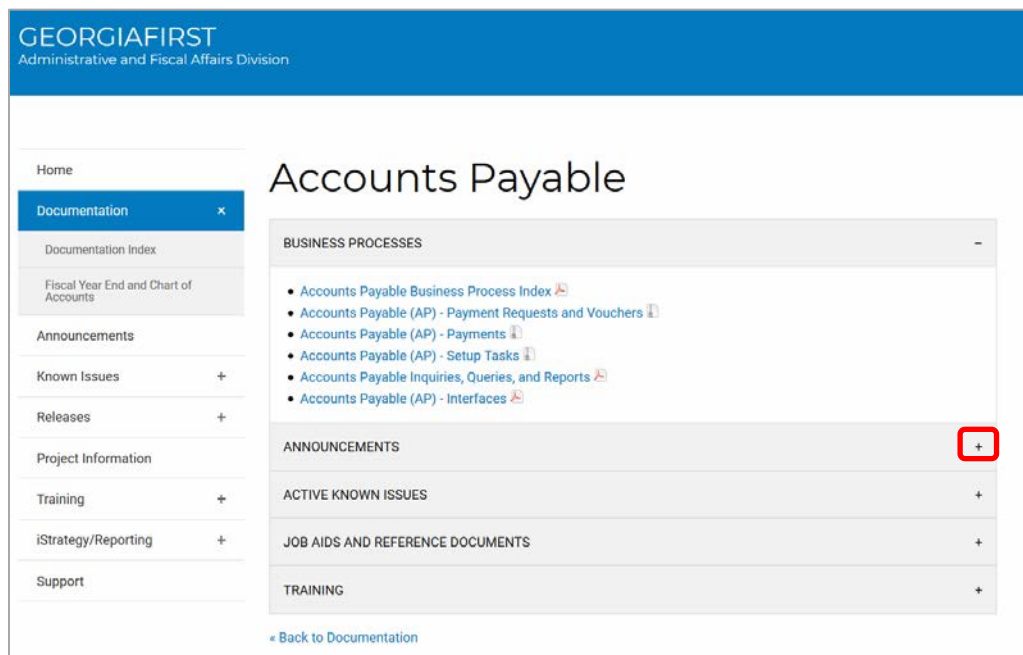
Home

- Documentation
  - Documentation Index**
  - Fiscal Year End and Chart of Accounts
- Announcements
- Known Issues +
- Releases +
- Project Information
- Training +
- iStrategy/Reporting +
- Support

## Documentation

- Fiscal Year End and Chart of Accounts
- General Job Aids and Reference Documents
- PeopleSoft Financial Modules
  - Accounts Payable**
  - Accounts Receivable
  - Asset Management
  - Banking
  - Budget Prep
  - DOAA Reporting
  - eProcurement
  - General Ledger and Commitment Control
  - OneUSG Connect (HCM) Integration
  - Purchasing
  - Queries
  - Security
  - Suppliers
  - Travel and Expenses

The module pages contain an accordion with module-specific Business Processes, Announcements, Active Known Issues, Job Aids and Reference Documents, and Training. Click on the plus sign on the right of the accordion to see the documents or videos in that category.



**GEORGIAFIRST**  
Administrative and Fiscal Affairs Division

Home

- Documentation
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## Accounts Payable

BUSINESS PROCESSES -

- Accounts Payable Business Process Index
- Accounts Payable (AP) - Payment Requests and Vouchers
- Accounts Payable (AP) - Payments
- Accounts Payable (AP) - Setup Tasks
- Accounts Payable Inquiries, Queries, and Reports
- Accounts Payable (AP) - Interfaces

ANNOUNCEMENTS +

ACTIVE KNOWN ISSUES +

JOB AIDS AND REFERENCE DOCUMENTS +

TRAINING +

Back to Documentation

## Fiscal Year End and Chart of Accounts

The Fiscal Year End and Chart of Accounts page contains proprietary information and is restricted to University System of Georgia personnel. Users should contact the ITS Helpdesk to obtain a username and password for access to this page. This page is divided between the Chart of Accounts and an accordion with Fiscal Year End Announcements, User's Guides, Mapping documents, and Workshop Presentations. It also contains zips files with previous years' documents.

### Fiscal Year End and Chart of Accounts

The Year-End processing and closing of GeorgiaFIRST Financials requires a coordination of effort between PeopleSoft Purchasing, Expenses, Accounts Payable, Payroll, Asset Management, and General Ledger functions and Banner functions to ensure that required tasks are completed in sequence. The current Fiscal Year End documentation, used to facilitate the timely and accurate completion of this process, is categorized into the following sections: Announcements, User's Guides, Mapping, Workshop Presentations, and Mid-Year Workshop Presentations.

#### Chart of Accounts

- [USG\\_Chart\\_of\\_Accounts\\_-\\_06.11.18.xlsm](#)
- [Account Request Instructions](#)

#### Current Fiscal Year End

To access all training materials under a particular category, click the plus sign on the right-hand side of the accordion row.

ANNOUNCEMENTS	-
<ul style="list-style-type: none"> <li>• <a href="#">A18-013_Fiscal_Year-End_2018_Sub-Module_Cleanup_and_Processing_Manual_Available</a></li> <li>• <a href="#">A18-004_FY2018_Year-End_ePro_and_Travel_Expense_Cutoff_Dates</a></li> <li>• <a href="#">A18-019_Fiscal_Year-End_2018_Processing_and_Closing_Manual_Now_Available</a></li> </ul>	
USER'S GUIDES	+
MAPPING	+
WORKSHOP PRESENTATIONS	+

#### Previous Years' Fiscal Year End

- [FY2016\\_Year-End\\_Documents.zip](#)
- [FY2017\\_Year-End\\_Documents.zip](#)







## Business Processes

Business Processes are in accordions under each module. The accordion contains a Business Process Index that lists all of the processes in that module under the category in which they can be found. The processes themselves are held in zip files with the category name. This accordion also contains a document listing key records and queries for the module.

## Announcements

All announcements that are sent to GeorgiaFIRST Financials mailing lists are posted on the Announcements page. Announcements are available in a pdf format. You can view current and archived announcements on this page or module-specific announcements under the Announcements accordion in a particular module.

## Announcements for 2018

Posted/modified	Announcement
2018-08-01	<a href="#">Allocation Steps Updated with 2019 Budget Reference</a> 
2018-07-17	<a href="#">Requests to Run BOR Queries by Department of Administrative Services (DOAS)</a> 
2018-07-17	<a href="#">System Maintenance Scheduled for FPLAY Database</a> 
2018-06-26	<a href="#">Fiscal Year-End Retros</a> 
2018-06-25	<a href="#">FY2018 Transparency in Government Act (TIGA) Reporting Information</a> 
2018-06-21	<a href="#">Benefit Reconciliation Online Adjustments</a> 
2018-06-21	<a href="#">GeorgiaFIRST Marketplace e-Invoice Delay Removed</a> 
2018-06-20	<a href="#">UPDATE: FY2018 Year-End Cutoff Dates for ePro and Travel &amp; Expenses</a> 
2018-05-31	<a href="#">Budget Prep Export Training</a> 

[View Other Years](#)





- [2018 Announcements](#)
- [2017 Announcements](#)
- [2016 Announcements](#)

## Known Issues

A Known Issue is generated whenever the PeopleSoft application does not perform in the way it was intended. Information regarding the known issue is sent to GeorgiaFIRST PeopleSoft Financials users via GeorgiaFIRST emails. You can view all posted issues on the Known Issues page of the GeorgiaFIRST website or module-specific issues under the Known Issues accordion in a particular module.

## Known Issues

### Active Known Issues

No.	Posted/modified	Known Issue	Status
KI9.2-94_EX	2018-05-30	<a href="#">Expense Report Variances on the BOR_KK_EXSHEET_RECON Query</a> 	Active
KI9.2-82_ePro	2018-02-05	<a href="#">Requisition Attachments Unable to be Viewed from Requisition Approval Page</a> 	Active
KI9.2-81_PR	2018-01-26	<a href="#">Benefit Reconciliation/Benefit Carrier Accounting File and Employee Status Codes</a> 	Active
KI9.2-79_PR	2018-01-23	<a href="#">Online Adjustments: Employer Deduction Codes Do Not Populate Accounts</a> 	Active

## Releases

Releases allow the GeorgiaFIRST Financials team to make updates to current PeopleSoft production. Known Issues can also be resolved with release items. If a known issue is resolved via a release, it will be annotated in the Release Notes. Users are encouraged to review the notes with each release to see if any actions are necessary. Previous release notes are also available on this page.

### Releases

Current Release

[Release Notes 5.34\\_May 17, 2018](#) - 05/17/18

Items Addressed in Current Release

- AP modifications to existing processes and new queries
- Resolved Known Issue KI9.2-83\_ePro
- ePro page changes
- New Benefits queries
- GL nVision Reports

Schedule of Future Releases

Release Number	Tentative Release Date	Primary Purpose
5.40	November 01, 2018	Annual Maintenance

## Project Information

Information for active and completed projects can be found on the Project Information page. This information includes project documentation, project communications, User Acceptance Testing resources, training resources, technical resources, project committee information, and more.

### Project Information

Active Projects

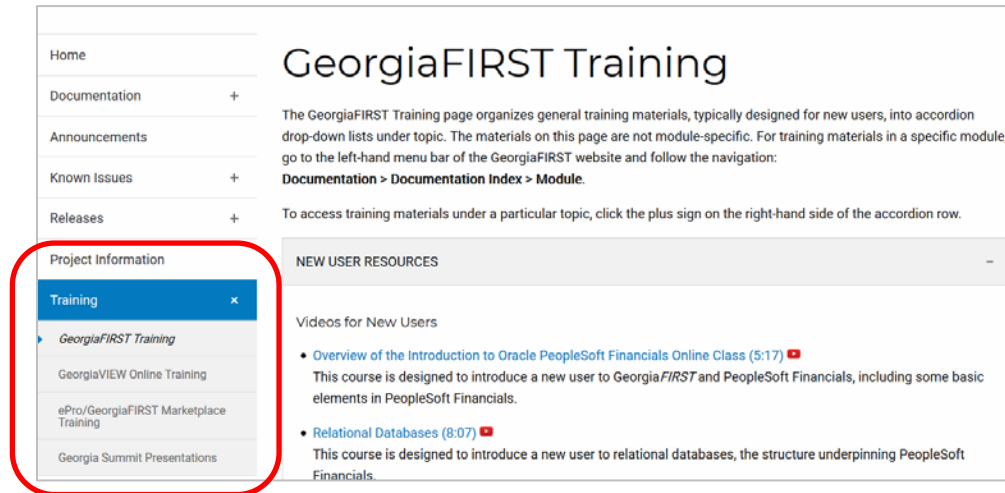
- [Module Enhancement Review Sessions](#)

Completed Projects

- [PeopleSoft Financials 9.2 Upgrade \(2015\)](#)
- [PeopleTools 8.52 Upgrade \(Fall 2013\)](#)
- [SciQuest/ePro Implementation Project \(Winter/Spring 2011\)](#)
- [PSFIN Consolidation Project \(July 2009\)](#)
- [PSFIN V8 Project \(Fall 2008\)](#)

## Training

The GeorgiaFIRST website has four training pages: GeorgiaFIRST Training, GeorgiaVIEW Online Training, ePro/GeorgiaFIRST Marketplace Training, and Georgia Summit Presentations:



The screenshot shows the GeorgiaFIRST Training page. On the left, a navigation menu is expanded to show 'Training' selected. The main content area features a section titled 'NEW USER RESOURCES' and 'Videos for New Users'. Two video links are listed: 'Overview of the Introduction to Oracle PeopleSoft Financials Online Class (5:17)' and 'Relational Databases (8:07)'. The page also includes introductory text about the training materials and navigation instructions.

- The GeorgiaFIRST Training page organizes general training materials, typically designed for new users, into accordion drop-down lists under topic. The materials on this page are not module-specific. For training materials in a specific module, you must go to the module in which you need training.
- GeorgiaVIEW Vista Online Training by GeorgiaFirst allows attendees to receive Continuing Professional Education (CPE) Credits by completing online courses and passing exams.
- ePro and GeorgiaFIRST Marketplace training materials, including videos, user guides and job aids, are organized in accordion drop-down lists under individual user roles (Shopper, Requester, etc.).
- Materials, including PowerPoints and handouts, from GeorgiaFIRST Summit presentations are uploaded onto this page.

## Support

Users can access ITS Customer Services and Helpdesk via the Support link on the left menu bar of the GeorgiaFIRST Financials website.