

ELTS CHANGE HISTORY HINT

Have you ever wondered if there was a way to track the changes made to an absence transaction, when the changes were entered, and which user performed them? There is! The Change History section within the Employee Banks screen captures and records changes to hours, leave types, and notes, as well as when Affidavits are voided or even deleted. Before and after snapshots are provided, as well as the logon of the user who performed the modification. All changes are highlighted in yellow so that they are easily identified.

Within the Employee Banks screen, click [+]

1. Click [+] to expand the desired Affidavit to display the Change Details; the date, time and user logon displays, as well as the screen the change was made within and the status of the transaction
2. Click [+] to expand an individual Change Detail to display the type of change that was made as well as the before and after snapshots display

The results that display within the Change History screen are exportable in PDF or CSV formats for reporting purposes. Simply click [Export] within the screen and select the desired format. If you need assistance with this feature, please contact the ELTS_Helpdesk@sbcscs.k12.ca.us



this issue

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NEW GL TRANSACTION FEATURES

New Journal Entry Audit Exception Rule – Deployed September 29, 2013 v2014.01

A new rule was created for the Journal Entry documents to prevent the person that last modified a document from being able to approve it and send it to the next step in the workflow. This was done to comply with appropriate system checks and balances to not allow the same person that creates/modifies a document to approve it. Releasing and approving are two different processes. Initial creation of a Journal Entry will always release into the workflow and send it to the "For Approval" workflow status. If the Authorized Agent edits a document, with the exception of modifying the Effective Date and Notes section, and approves it, the document will no longer be sent to the next step in the workflow. The document will still stay in the "For Approval" workflow and be available on the Approvals page until another Authorized Agent approves it without editing it. This new rule is a configurable feature by district.

Insert Approver –Deployed October 12, 2012 v2013.02

A new feature has been added to the Add and Edit pages to give users the option to insert approver(s) on a document. The Insert Approver button, which is currently disabled, will now become enabled once a document has been saved and validated on the Add page. While on the Edit page, this button will now always be enabled. The Insert Approver dialog window will pop up if the Insert Approver button has been clicked. The user can select the available group or groups that they want to insert as approvers on the document. By highlighting the available group and clicking on the "Show Users in Selected Group" button, the user will be able to see

user logons that belong to the highlighted group. To select the group you want as insert approver, highlight the available group and click on the Add button. To remove a group, highlight the selected group and click on the Remove button. The Route button becomes enabled when the Selected Group(s) box is no longer empty. Clicking the Route button releases the document into the workflow and sends it according to the inserted approver (s) on the selected group. Note that it will send the documents in the order of how the insert approver(s) were selected. This new feature will help with the need to get approval on a document from someone that is not in the predefined workflow for the transactions.

New GL Workflow With Reviewer - Deployed to production on August 24, 2012 v2013.01

An enhancement has been added to the Journal Entry program to accommodate requests from the larger districts to allow for an additional level in the workflow. The workflow group is called GLWFReviewer. With the use of this new workflow group, once a Journal Entry has been released into the workflow by the Creator, it will move to the Reviewer before it is sent to the Authorized Agent. The Journal Entry would appear under the Financial>Approval page assigned to the group GLWFREVIEWER with a workflow status of "For Approval". This new workflow may be added into the district's workflow upon request of your county's Information Technology Department. A configuration change must be made by a programmer as well as a new security code/group linked to the particular user(s) in order to become a "Reviewer" in the workflow.

ID	Pos	Event	Entered	Posted	Status
4	ELT_T	04/09/2013	04/24/2013	04/24/2013	PERSONAL_NCESS Y DDC
4	ELT_T	04/17/2013	04/24/2013	04/24/2013	PERSONAL_NCESS Y DDC
4	ELT_T	04/09/2013	04/19/2013	04/19/2013	PERSONAL_NCESS Y DDC
3	ELT_T	04/04/2013	04/24/2013	04/24/2013	PERSONAL_NCESS Y PFER
3	ELT_T	03/04/2013	04/24/2013	04/24/2013	PERSONAL_NCESS Y PFER
2	ELT_T	02/28/2013	04/24/2013	04/24/2013	PERSONAL_NCESS Y PFER
2	ELT_T	02/27/2013	04/24/2013	04/24/2013	PERSONAL_NCESS Y PFER
12	ELT_T	02/28/2013	04/24/2013	04/24/2013	PERSONAL_NCESS Y PFER



UPCOMING EVENTS Meetings and Trainings for October and November

ELTS Fall User Meeting – 10/17/13

Purchasing/Stores User's Meeting – 10/18/13

Payroll W2 Year End Meeting – 11/5/13

EPICS Fall User Meeting - 11/13/13

General Ledger Design Meeting – 11/20/13

GL.NET PERFORMANCE SURVEY

Reasonable application response time is top priority when referring to performance of Financial 2000. With new program development being phased-in with the General Ledger and Budget Development programs, staff put together a Performance Survey that was sent out to all San Bernardino County districts on Tuesday, August 13, 2013. The purpose of the survey was to determine user expectation of 'reasonable response time' and to establish a measure of current user satisfaction.

Besides rating overall performance for the General Ledger system, users were asked if a decrease in performance was noticed after new transactions were deployed and to rate the performance by transaction for each tab and function. Along with these

ratings, users were asked how many seconds it takes to process these tasks and what is considered an acceptable processing time. The survey allowed for additional comments and offered the district an opportunity to consent to a work session to share any experiences of performance issues.

Questions regarding the Budget Development program pertained to the Roll to General Ledger (GL) and Beginning Balances synchronization. Users were asked to rate the performance of these functions and provide approximate processing times.

The online survey closed on Wednesday, August 21, 2013. Overall, the users that responded to the survey indicated the

systems performance was good. The management team is currently reviewing and analyzing the districts' specific responses to identify if any program areas need improvement.

Application response time performance is a key factor for user satisfaction just as user feedback is essential to sustaining an efficient program. We appreciate the time and effort given by the users that responded to the survey and recognize that the success of the Financial 2000 applications is built on teamwork through the collaboration with each and every user.

If you are interested in participating in the survey, please contact our office at (909) 496-9600 or email the helpdesk at ms_helpdesk@sbcss.k21.ca.us.

SPOTLIGHT ON EMPLOYEE DIRECTORY

Some applications are accessed each and every day, while some get forgotten and seldom used. One of the Financial 2000 applications that few people are aware of is the Employee Directory. It is accessed through the Financial 2000 Suite of Programs and set up with a Security Group. This application can be used to inquire about employees across the County, or narrowed down by District.

The search criteria fields are Last Name, First Name, SSN, District (as a Drop Down List) and Pay Calendar. Once the selection criteria have been determined, the Search Results Grid will display the following information: District, Last Name, First Name, Last 4 Digits of the SSN, Pay Calendar, Last Paid Date, Termination Date and any Previous Name. Any confidential data related to an employee is not displayed.

This application was originally designed as a way for high level HR/Personnel Administrators to easily be able to track employees who had worked at multiple districts. The Security attached to this application is set to a very high level since it does cross Districts.

If you are interested in learning more about this application, please contact the MS_Helpdesk@sbcss.k12.ca.us.

[Link to Calendar](#)

<http://www.cecc.org>

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