Dec 2015

Program Code long description document - new
A pdf document with long descriptions of our program codes is now available in the Wiki, either via Chapter 2 under FOAPAL.

Upload Student AR Transactions - new
This new link and functionality now appear on the WSU Finance Extensions menu for users granted the privilege to upload charges to individual student accounts. (Similar functionality used to be accessible via the Employee tab.) An instruction pdf file is available via the Documents page.

Nov 2015

FOAPAL Hierarchies Report - updated
Hierarchy report for organization codes is now updated and includes many new features including the display of Financial Manager and default fund/program, and the ability to export to Excel.
Please see the Organizational Hierarchies section of Chapter 2 Organizational Hierarchies for details.

Oct 2015

Managed Print - updates
Managed Print Detail page now includes a button to Export Selected rows to Excel, based on your Search criteria.
File Upload page is now available for Business Managers to upload a .csv file with Assigned FOAPs info, instead of keying in manually.
Please see the Managed Print section of Chapter 11 Managed Print for details.

May 15 2015

Journal Voucher Disapproval emails - now also copy Disapprover
Whenever a user disapproves a WINGS Express Finance Journal Voucher (rule code J16, BT2, BT4), an email has always been sent to the JV Originator to let them know they JV they created is disapproved. If the Disapprover keyed in a Comment when disapproving, the Comment should also appear in the auto-email to the Originator. Starting 5/15/15, the Disapprover now also gets that same email.

Having the Disapprover see the email allows the Disapprover to see if any Comment they keyed in got included in the auto-email. We have been experiencing intermittent cases (~10%) where the Comment does not appear in the auto-email. As Banner will be changing the platform of WINGS Express Finance in the near future, this is our workaround for now.

March 2015

New Balance Available Carryover 777030 subtotal
New Account Type (7X) and new (Level 2) Account Code created for 777030 account code used for Balance Available Carryovers for most unrestricted funds. The new Account Type and Levels allow 777030 to appear on its own/separate line in reports like the Balance Available Report.

New Stipend Account Subtotals
New (Level 2) Account Codes were created to provide separate subtotals for Stipends on reports like Balance Available Report. For example Account Code 611105 Unclassified Stipends used to roll into (SWG10) Salaries & Wages-Unclassified and now is pulled out to the new (SWG11) Stipends Unclassified.

Occasional web page error when opening new web pages
Sometimes when you are first opening a web page for one of the new/rewritten links like Transaction Detail Report, you may get a browser web page error the first time you try to open it. Please close the error page and click on the WINGS Express Finance link again, and the web page should open fine the second time. We are aware of this issue and working to address it. Thanks for your patience.

February 2015

WrightBuy - User Definition View Access for WCPAs
Workflow Control Point Administrators have additional access in WrightBuy to view User definitions including roles, approval queues, and departments. Please see the WrightBuy section of the Wiki User Definitions for details.

January 2015

Managed Print - new link for some users
A new Finance menu link will appear for Financial Managers and selected other users. This service helps maintain information

for employees who copy and/or print at departmental machines to determine which FOAP(s) these services are charged to, etc. More information will be forthcoming! Please see the Managed Print section of Chapter 11 Managed Print for details.

December 2014

Transaction Detail and Translator Enhancements
Transaction Detail Query now includes some enhancements gathered since the "New" version was rolled out in March 2013. These include validation of FOAPAL inputs as they are entered; addition of Index; display of title when a single fund, org, or account is selected; increase in rows output from 50 to 100 per page; extension of time-out from 30 minutes to 1 hour; optional calendars to input dates; drill-through on General Encumbrance and Direct Cash Receipt documents; and double-click to clear a single input cell's value and title. For additional details about using Transaction Detail and tips to optimize performance, please see Chapter 5 Transaction Detail.

Translator Enhancements The former FAS/Banner Translator service is rewritten and now includes input validation, Financial Manager, and PI for grant-related funds. For convenience, a Code Lookup is available on this same page along with quick links to the Wiki pdf documents with detailed descriptions of account codes. As we are now in our tenth fiscal year in Banner, the legacy "FAS" lookup service no longer appears here. For additional details, please see Chapter 2 Translator.

May 2014

Attaching PDF documents to Finance docs
Using the eFolder button rolled out in May 2012 to enable selected users to click through to see any supporting documents stored electronically in the Xtender system -- selected users are now able to attach PDF documents. Please see Chapter 3 Attaching Source Documents for details.

December 2013

Transition from Transaction Detail Query Old to New
In the new year, March 3, we anticipate removing the link to the Transaction Detail Query Old. It will have been a year since we provided the Transaction Detail Query New version, which pulls data from the Operational Data Store to preserve performance on the Finance and other modules. Going forward, we will continue to use the New version only.

September 2013

Procurement Card Charges Post Weekly instead of bimonthly
University procurement card purchases start transitioning to post to Finance on a weekly basis, instead of bimonthly. (PRxxxxx journal voucher document code)

June 13, 2013

WINGS Express Finance Journal Vouchers: MyAlerts Notifications and Purging Schedule
Users now have an additional way to view Journal Vouchers (JVs) awaiting approval: the MyAlerts Channel on their WINGS Home Page.

The MyAlerts channel displays an alert when you are NextApprover for a Journal Voucher that reads Next Approver for Document Jxxxxxx.

- The alert remains in the channel until the JV is approved/disapproved. (The alert then switches from Current to Archive status automatically & is no longer visible on your WINGs Home page display.)
- Like the Campus Announcement channel, you may click on an alert to read more about it (JV description & originator) & also use the displayed link to drill-down directly to the JV in WINGS Express Finance.
- Weekly (on Monday), you will receive a Reminder email for any NextApprover JV notifications which have been sitting in your MyAlerts channel since the previous week. (The weekly Reminder emails will occur for a maximum of a month.)

The channel will also display an alert for any Journal Voucher which you originated in WINGS Express Finance which has been disapproved. The alert includes the disapprover and any text they input when disapproving.

You may refresh your WINGS Home page display in your browser (using the F5 key etc) in order to see the most current list of MyAlerts.

The current real-time email notifications for NextApprover & Disapproved JVs will continue to be sent. The WINGS Channel provides one place for you to see the status of all JVs which may require your attention. Some of you may receive other types of alerts in your WINGS MyAlerts channel as well.

Disapproved Journal Vouchers: timing of purging
With our most recent Finance upgrade 5/19, Query Budget now includes the ability to View Pending Documents. Since disapproved Journal Vouchers are included in the list of Pending Documents, we will be removing/purging disapproved Journal

Vouchers after they have been sitting disapproved for 2 weeks. (Previously, we removed disapproved Journal Vouchers after they had been sitting disapproved for a month.)

May 20, 2013

WINGS Express Finance - Upgrade
WINGS Express Finance will be upgraded from version 8.4 to 8.6. Some new functionality you may notice includes:

- Query Budget will have an indicator, if there are Banner documents pending in the system for your queried FOAPAL. Clicking on the indicator then displays
  - A list of the pending documents.
  - A calculated Available Balance adjustment including the listed pending documents.

For additional details, please see Chapter 5 Viewing Pending Documents via Query Budget
This upgrade also enables the Payroll Expense Detail Query to display results for funds associated with grants (e.g. 66% funds). This query will run quicker, the more of the FOAPAL information you are able to specify in the input parameters.

Mar 5, 2013

Transaction Detail Report -- New Version
To improve performance, reduce the impact on other production services, and provide some query parameter enhancements, the Transaction Detail Report ***New*** version is now available via the Finance menu. The previous/old version will also be available via the WSU Finance Extensions menu for approximately 3 months as we transition. For additional details, please see Chapter 5 Transaction Detail.

Sept 11, 2012

Balance Available Report Project End Date field
The Project End Date field on the Balance Available Report was adjusted to display the end date of the fund requested, in the case where a grant has multiple funds. Note that the Grant Attribues List may still be used to view both the end date of the fund as well as the Entire Project End date for the related grant.

Sept 10, 2012

Transaction Detail Query enhancements
The Transaction Detail Submit button now changes to read "Please wait" while your query is running and adjustments were made to enhance the performance of the query itself.

May 25, 2012

Viewing Source Documents via Link to Xtender
On the ViewDocument page, a new "Finance eFolder" button in the lower left enables selected users to click through to view any supporting documents stored electronically in the Xtender system. This may include vendor invoices, travel expense reports, DPOs, Cash Remittance Vouchers, Petty Cash Vouchers, etc. Please see Chapter 3 Viewing Source Documents for details.

April 27, 2012

Various Enhancements -- JV Document Text and Code Lookup
Various enhancements were made to correct web page behavior due to Oracle issues, including --

- When creating an Expense or Budget Transfer, Document Text is no longer "lost" when a FOAPAL error is encountered.
- WSU Finance Extensions, Code Lookup now sorts by Code order, as desired. (E.g. if you Lookup Account, with Code Criteria = 73%, and bump up the Rows to Return and click ExecuteQuery button -- the resulting list shows all 73xxxx supply accounts in account code order).

February 17, 2012

Procurement Card Charges Post Bimonthly instead of monthly
Starting February 2012, procurement card charges (PRxxxxx journal voucher document code) are posted bimonthly instead of monthly. This allows users to have more current expenditure information in WINGS Express Finance.

February 10, 2012

Transaction Detail Report Performance Tip
The Transaction Detail Report now includes a tip displayed at the top of the page "To improve performance time -- after clicking SubmitQuery, please let your query run to completion. (Closing the browser or clicking X does not actually halt the query in progress & makes any subsequent query slower.)" Allowing your query run to completion before launching another query will help improve response time in WINGS Express for Finance & the other modules.

Please see Chapter 5, Transaction Detail for additional details about running this report.

November 28, 2011

WINGS Express Finance upgraded from version 8.3 to 8.4.
This upgrade fixed 2 previous problems with the Banner-delivered Journal Voucher (JV) Template:

- If you use a BT2 or BT4 rule code for your JV Template, the rule code will be retained and not revert to the J16 default rule code.
- If you have a + on the first FOAPAL line of your JV Template, the sign will not revert to the - sign default when you use the template.

See the JV Templates section for additional information about JV Templates.

November 7, 2011

Grant Attributes List - Now Includes Entire Project End Date
Many grants are multi-year, but the sponsor sends authorization to WSU in annual increments at which time the grant End Date is formally extended in the Finance system by RSP. Since there may be delays in receipt of annual funding, this new Entire Project End Date field displays the anticipated timeframe for the life of the grant to assist users when initiating and approving expenditures, etc.

July 18, 2011

Journal Voucher Email Notifications Enhancement
Email notifications users receive for Journal Vouchers (JVs) are now enhanced.

- **NextApprover** emails now include Originator name & JV description.
- **Disapproved** emails sent to the Originator now include the name of, & any comments provided by, the user who disapproved.
- Both types of emails include a link to go directly to that specific JV.

April 26, 2011

WINGS Channel available for Finance Approvals
A new WINGS Channel is available which displays the number of Journal Vouchers awaiting approval where you are NextApprover. This is a handy tool, in addition to the automated emails which notify users when they are NextApprover for a given Journal Voucher. Please see WINGS Channel: Finance Alerts-Approvals section of Chapter 4 Approve/Disapprove Documents for details. ***Channel removed 2015***

March 16, 2011

Balance Available Report Enhancements
The Balance Available Report listing of your fund/org pairs now includes OrgLevel5 (department), and may also be sorted by FundCode or OrgCode. The period defaults to the current period, instead of July, and the fund/org list may be downloaded. Please see the Balance Available Report section of Chapter 6 for details.

February 14, 2011

New Payroll Expense Detail Query
This new functionality came delivered with the WINGS Express Finance version 8.3 upgrade in December 2010 and was enabled for selected users in February, 2011. This new query provides by-employee details from the Payroll module for Salary & Benefit account codes. Please see the Payroll Expense Detail section of Chapter 5 Payroll Expense Detail Query for details.

December 13, 2010

WINGS Express Finance upgraded from version 8.1 to 8.3.

- No noticeable changes when upgraded.
- Selected Step-by-Step documents have been updated. See Document wiki page for listing.

June 16, 2010

Transaction Detail Report Enhancements
The Transaction Detail enhancements include:

- Ability to **suppress $0 rows** (for both display & download).
- **Optional navigation** to Advanced Filter page.
- **Advanced Filter page is now "sticky"** for a given user session to reduce data reinput.
- Output now
    - Includes **Encumbrance Number** column (to help tie invoices to related POs etc).
    - Includes **Predecessor Account** Code column, for ease in subtotaling via Excel to tie Balance Available Report amounts.
    - Calculates **NET** instead of HASH total when revenue is included.

Note: Enhancements below were initially rolled out to Production 5/21, then removed 5/24 for further refinement & performance improvement.

Please see Chapter 5, Transaction Detail for additional details about running this report.

Spring 2010

Course Fee Revenues by Quarter in 5022xx Account Codes
Amounts posted to accounts 502200 Laboratory Fees, 502600 Misc Student Fees, & 503000 NonCredit Fees via Bursar Office feeds are broken out into separate 5022xx Course Fee Revenue accounts, by-quarter, starting with Spring 2010. This should help departments review/reconcile their activity. In WINGS Express Finance, you can use Code Lookup for Account 5022% to see a list of the by-quarter Course Fee accounts.

March 3, 2010

Grant Attributes List: addition of Fund's default Org Code
The Grant Attributes List output now includes the **default organization code for the specific fund**(s) associated with a given grant.(Some grants have multiple funds, not all of which share the same organization code.)

January 19, 2010

Approve/Disapprove Documents navigation enhancement
By clicking a Journal Voucher Document Code in the list of Documents for approval, a **1-page layout** displays with Document Information, Approvals Recorded & still Required, as well as buttons to add Manual Approvers, Email the Document, and take action to Approve/Disapprove as applicable. This enhancement helps streamline the JV approval process and ensures users are taking action on the appropriate JV. (Previously, users had to click the Document Code for document info, then navigate back to the list & click Approval History to see Approvals information, then navigate back to the list to click Approve or Disapprove, as appropriate.) Please see Chapter 4 for more information related to Journal Vouchers.

November 2009

Cash Remittance, Invoice, and Petty Cash Voucher Document #s appear in Descriptions
Starting in November 2009, the Fxxxxx Journal Voucher feeds from the Bursar's system include the preprinted form document number in the transaction description for Cash Remittance Vouchers, Invoices, and Petty Cash Vouchers. This allows users to more quickly see the link between the Reference Number stamped on the document by the Bursar's Office when it is input & the preprinted document number on their copy of they hardcopy form.

September 10, 2009

Documents and videos added/updated throughout the Wiki

- See the Documents chapter & Videos chapter for quick clickable lists of items available (including Account Code lists with descriptions).
- You can also see Chapter 4 Journal voucher JV Types & Signs for a new Debit/Credit Transaction Guide aid for creating Journal Vouchers.

May 8, 2009

WSU **enhancements made for looking up Journal Vouchers**.

- Input fields have been added for Fund, Organization, Account, & Rule Code to help you lookup JVs.

- Click on View Documents, select Journal Voucher type from the drop-down menu, then click the Document Number button to get to the enhanced web page.
- See Viewing Documents link here for more details.

March 13, 2009

WSU **enhancements made for Journal Vouchers**

- Approve/Disapprove Documents: the list of Journal Vouchers (JVs) for approval includes additional columns for Description and Rule Code.
- View Documents: When searching for JVs, additional columns include Document Amount, Description, Rule Code, & a link to click if you wish to create a new JV by copying the JV listed. See JV CopyFrom section of the Wiki for more details on the UseCopy functionality.
- Jumpstart JVs: these JVs are starters with common information prepopulated for certain entries which may save users time inputting. See the Jumpstart JVs section of the Wiki for more details and a sample screenshot.

March 2, 2009

WSU **WINGS Expess Finance Wiki rolled out** to provide a robust content environment for WINGS Express Finance information

- The Wiki includes text, screenshots, videos, step-by-step guides, as well as search capability.
- Content will continue to be added to make this the primary training/resource site for users.
- Updates to content are made centrally, not by all users as in some web Wikipedia environments.
- The Finance Wiki takes the place of the previous Finance WRC (WINGS Resource Center) information.
- Links to relevant sections of the Finance Wiki are provided in the WINGS Express Finance menu and **Help links** to make it easier for you to find additional information for a specific task.

February 9, 2009

WINGS Express Finance upgraded from version 7.2 to 8.1.

- Changes made to the Create Expense or Budget Transfer link:
  - 35-character description is now required in order to complete a transfer.
  - A yellow warning triangle may appear at the time you complete a transfer & receive the Jxxxxx document code. This warning may be disregarded Ã□Â□Ã□Â¢Ã□Â□Ã□Â□Ã□Â□Ã□Â□ your Jxxxxx document is now on its way through approvals in order to post.