the general ledger

News from the Princeton University Office of Finance & Treasury

PRINCETON PRIME

We are actively preparing for the July 2014 implementation of Princeton Prime, the initiative to implement our new chart of accounts, enhance our reporting and business processes, and upgrade many of our financial systems and tools.

In this special edition of The General Ledger, we highlight the many Prime-related initiatives that will require your participation and support in the coming year. To help you stay informed and prepare for Prime, we will be increasing the publication of The General Ledger newsletter from bimonthly to monthly through July 2014.

Introducing the Prime Portal

We are happy to introduce the Prime Portal! This web portal will take you to information about Prime and will directly link you to Prime's new financial applications. Using the RSS feed feature, you can subscribe to Prime updates. The portal will be updated frequently with news, updates, new trainings, and important information about the project. We recommend that you check back often, and subscribe to the RSS feed! https://prime.princeton.edu/

Email your questions and comments about Prime: prime@princeton.edu

New! Prime Information & Training Pages

In addition to the Prime Portal, we have added a new series of pages about Prime to our Finance and Treasury website, called "Prime Information & Training." Please check these pages for information about "What's New and Different?" Once you log in, you will find Prime-related information organized by subject area including buying and paying, reporting, security and approval.

Throughout the Finance and Treasury site you will begin to see new pages and callouts with the Prime logo. This logo will indicate that the information provided is a new or different process for Prime.

Prime: What's Happening When

Prime will organize several activities to help prepare for July 2014. The chart on page 2 gives an overview of key preparation activities and dates.

User Data Collection

In January and February, we will ask Prime Department Contacts to help complete our User Data Collection effort. Through hands-on User Data Collection sessions, Prime team members will meet with departments. A newly-created collection tool will be available to define system access requirements and identify the individual training needs for each person in the department.

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Princeton Prime Implementation Timeline

Jan. 2014 – Feb. 2014	• Department User Data Collection (Security/ Training) • Crosswalk Tool Launch • **Start Prime What's New & Different Info. Sessions**
March 2014	• Continue What's New and Different • **Register for Training** – Hands-On Courses
April 2014	• Online Training (Basic Navigation) Courses Available • Review Department Get Ready Checklist(s) on Portal
May 2014 – July 2014	• **Start Hands-On Training** • Prepare for Go Live • Perform Year-End Close
July 2014 – Dec. 2014	• **Continue Hands-On Training** • Stabilize business processes and systems

During the user data collection process, we will:

- confirm which individuals need ChartField access to Department and Program fields;
- identify departmental approvers (and their associated dollar-level of approval); and
- determine which individuals in the department will hold financial functions and the training courses they will need in order to implement Prime in their department.

Prime Training

Prime training preparations are well underway. All training will be delivered on campus or at 701 Carnegie by Prime/Finance and Treasury staff and other departmental experts. Participants will learn about business process changes as well as how to perform transactions in Prime systems. A variety of delivery methods will be available, organized into manageable time segments. Methods of delivery include:

- **Online Training:** Self-paced training courses taken through the Employee Learning Center right at your desk. No pre-registration will be required for these courses.
- **Classroom Training:** Instructor-led training courses offered in computer labs. Participants will have the opportunity to practice using exercises and simulations that represent real-life scenarios. This hands-on training will begin in May and continue through fall 2014.
- **Information Sessions:** Lecture-style training courses, which provide information about what's new and different for specific business processes.

Prime Online Support

Through the Prime Portal, the Finance and Treasury website, and the new Prime systems, users will have access to on-line support. This will include system navigation videos and

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PRIME CONTACTS FOR YOUR DEPARTMENT

We recently sent a note to all departments to identify and confirm their main Prime contact(s). Going forward this individual will receive any department-specific information about Prime. Thank you for your response and participation.

printable Step-by-Step instructions for processes and system transactions.

Training Registration and Tracking
The Employee Learning Center will continue to be the place to register for training and track completion and history. A new Prime Training page will soon be available and will be updated as new offerings are added.

Level 100 Courses (Prime: What's New & Different)
Beginning in February, we will offer a series of Level 100 information sessions where we will discuss the changes you can expect when Prime is implemented in July. Topics will range from "What's New & Different: Buying & Paying" to "Prime Reporting" and "Prime Security and Approval." For more information, see the Prime Information & Training webpage.

Year-End Close
The 2014 year-end close activities will begin earlier in preparation for the transition to the Prime systems. More information will be provided in our February newsletter.

Prime COA Mapping & Crosswalk Tool

Thank you once again for participating in our effort to map our current project grants to the new Prime chartstrings. With your help we mapped more than 30,000 project grants. The Crosswalk tool is now available in the current Information Warehouse. For more information about how to use the tool click here.

Requesting New Project Grants between Now & July 2014

In preparation for Prime implementation, we are making some changes to our Fund 10 and Fund 20 request forms. You will now see an area for mapping your newly requested project grant to a new chartstring. The new Fund 10/20 request form is now available on the Finance and Treasury website.

New Timeline for Travel & Expense Program Rollout

Princeton's new Travel and Expense Program will continue in pilot through spring 2014 for campus faculty and staff. Implementation of the program and its related travel booking and expense management tools, including Concur, will coincide with the implementation of Princeton Prime in July 2014.

In the meantime, the pilot program for travel booking will expand to include additional administrative departments. However, faculty and staff in academic departments will continue to use current systems and processes for business and travel expense reimbursement this spring.

Changes to our current expense management systems and processes will begin in June, July, and August 2014 as we migrate to Princeton Prime. The timing for cutover to various processes may vary (reimbursement, new expense reporting tools), but will align with Prime Purchasing Card reconciliation and other Chart of Accounts-related process and systems implementations.

YOU HELPED BUILD THE CROSSWALK!

- **200 Department Meetings**
- **350 People**
- **30,000 Project Grants**

THANK YOU!

Student Travel Registration Using Concur

Travel Care for students, implemented on January 6, 2014, replaces former student travel registration methodology (and the Travel Registration Database). Currently, all undergraduate students must register their travel using Concur.

Over time, other University travelers will be encouraged to register travel using the new system. A new website supports Travel Care registration, http://travel.princeton.edu/.

For more information about the Travel and Expense Program timeline or about Travel Care, please contact the Financial Service Center by phone, (609) 258-3080 or email finance@princeton.edu.

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