In March 2014, Queen's implemented a new financial reporting tool that provides a user friendly way to obtain financial information from PeopleSoft Finance. This reporting tool will replace the current use of PeopleSoft (PS) Query and provides a new method for users to access the Statement of Operations (both Research and Non-Research).

PS Query was never anticipated to be a long term financial reporting tool, and is not sustainable due to the performance impact on the PeopleSoft system, the ongoing maintenance of public and private queries, and the duplication of effort for departments to reinvent queries written elsewhere.

Access to PS Query and the PS Statement of Operations will be phased out as part of the PS upgrade to version 9.2. The objective of this document is to lay out the comprehensive transition plan to the new financial reporting tool.

The move to phase out PS/Query and Statement of Operations access and promote FAST will have five components:

1. **Analysis of Public PeopleSoft Queries**

   As part of the transition strategy the top 80 public queries (based on run volume) have been identified. These most frequently run public queries represent all of the queries that have been in run more than 60 times since go-live.

2. **Query Mapping**

   The top 80 public queries have been mapped to reports in the Financial Reporting System to assist end users in getting access to their information. Each query will have a link shown that will take the user to the filter page for the report and details/instructions. This mapping can be found at:

   http://www.queensu.ca/traq/financial-reporting/mapping-your-peoplesoft-reports-queries

3. **Communication**

   The plan to phase out queries and the statement of operations has already been communicated through a number of different means; business officer meetings, presentations at departmental events, e-mail, news stories and messages in the Queen's Portal. As we get closer to go live more directed communications will be coming to staff and faculty informing them of what resources are available.

4. **Training**

   There is training available on how to run reports in the new financial reporting tool at:

   http://www.queensu.ca/traq/financial-reporting/fast-moodle-training-courses

   Further training on how to run the new research statement of operations reports will be completed and posted soon.

5. **On-going Support and Development**

   As part of the transition to version 9.2 of PeopleSoft, drop-in sessions will be available to assist individuals who still have questions after taking the online training. Details on the training and scheduling of the drop-in sessions will be available shortly.

The key to success for this transition is getting users comfortable and actively using the new financial reporting tool as quickly as possible. Training for the new financial reporting tool is available now and is essential for users.

If you identify financial information you are unable to access when using the new financial reporting tool, please inform Financial Services as soon as possible as we are continuing to work on additional reports that will be rolled out following the PeopleSoft upgrade. If there are questions or concerns please contact Edward Fingland at fingland@queensu.ca or at ext. 75600.