Questions from Financial Portal 2.0 Demo

1. **Will this Financial Portal refresh address the recent rash of system errors/downtimes (e.g., end-of-day processing)?**

   While this refresh will not directly address the recurring system errors/downtimes that occur during End-of-Day processing, this is the first step to upgrade the overall RCUH financial system so that we can continue to improve the system and replace processing with modern technology.

2. **With the new system, do we need to request access to the different accounts again, or will our access automatically transfer over?**

   All existing user accounts, user types, and user access will be migrated to Financial Portal 2.0. All you will need to do is reset your password prior to logging in for the first time.

3. **Will all active and historical documents (e.g., Purchase Orders, Travel Documents, etc.) be transitioned to the new Financial Portal 2.0?**

   Yes, all active, pending, and historical documents will be seamlessly migrated to the new Financial Portal 2.0.

4. **Will the Financial Portal notices in the General Announcements section be listed in the "Help" section?**

   For now, we will continue to post notices for scheduled outages and maintenance on the Main Menu of the Financial Portal 2.0. Announcements regarding errors that occur during End-of-Day processing will continue to be posted in the General Announcements section.

5. **Is there an easier way to find the correct budget category?**

   We will share this with our development team for consideration as a future enhancement.

6. **When you view the PDF for a PO, can you see the print status of the Vendor PO (i.e., if it is marked as already been printed)?**

   The PDF version of an approved PO will be the "RCUH Copy". As we continue to improve our system and make necessary modifications to our forms, the PDF version ensures that we have an exact copy of the document at the time it was approved. To see the print status of the PO, please continue to go to the Approved PO Documents listing screen which will include the Printed Date to indicate if the PO has already been printed.

7. **Can users upload more than one file at a time in the File Attachments section?**

   Only one file at a time can be dragged and dropped into the File Attachments feature. We will consider the ability to upload more than one file as an enhancement for future implementation.

8. **Are users able to recall transactions after submitting them to the Fiscal Administrator? If not, are there plans to install this feature?**

   As this time, there is not a way to recall a transaction after submitting it to the Fiscal Administrator. If this occurs, please contact your Fiscal Administrator or business office and request that they click on the "Request More Info" button to return the transaction to you. We will share this request to add a recall feature with our development team for review.

Questions from Financial Portal 2.0 Demo

9. **What is the estimated time frame for responses to support tickets?**

   Tickets will be addressed in the order of priority. You will receive acknowledgement of your ticket as soon as it is submitted.

10. **Will there be a routing mechanism for signatures within the RCUH system?**

    At this time, there is not a routing mechanism for signatures within the RCUH system but we will share this with our development team for review.

11. **Is there a keyword search for all Financial Portal documents, such as a name search?**

    We recommend using the Search All Documents feature in the Miscellaneous section. This feature enables the user to search through all transaction documents (PO, Non-PO Payments, Travel) in one area.

12. **Is there a "wildcard" character for the search field if you don't know the whole value you are searching for?**

    No, wildcard characters will not work in the search functions. However, the default search functions already perform a wildcard search like using wildcard characters in that it matches characters in a word. For example, entering the criteria "UH" may return documents with words that start with UH and words that contain "UH" (for example, UH Bookstore, RCUH, etc.). Or entering part of a document number "Z1023" may return documents that start with "Z1023" or contain "Z1023".

13. **Will the transaction numbers remain the same (i.e., POs will still start with Z)?**

    Yes, confirming that the PO numbers will continue with the Z number format, and will not reset.

14. **Have any changes been made to the Reports function?**

    No changes have been made to the report data or how the reports function operates. However, users may notice slight differences in the user interface (margins, layout, font, etc.).

15. **Can users export the information via Excel or CSV?**

    In the Reporting functions, all reports with the ability to download a csv file in Financial Portal 1.0 will also have the ability to download a csv in Financial Portal 2.0. The data and format of the reporting csv files will also remain the same.

    The Search All Documents feature also provides the ability to download all of the search results as a csv file. At this time, the Search PO Documents, Search Payments, and Search Travel Documents features do not have the ability to download the search results as a csv file, but we will share this with our development team for consideration as a future enhancement.

16. **Does the travel request date and travel time read 24hr format/military time or will we have to enter 12hr format and AM/PM if we opt to do it manually?**

    Travel times can be entered in 12HR AM/PM format. Travel times are not displayed in 24HR military time.

Questions from Financial Portal 2.0 Demo

17. Can the end-of-day processing of the Financial Portal be later, similar to Kuali's 8:00 p.m. cutoff?

Unfortunately, we are not able to adjust our End-of-Day processing schedule at this time.

18. When viewing payment numbers and dates, is it possible to add a clickable link with a copy of the check or ACH confirmation?

Thank you for the suggestion. We will share this with our development team for consideration as a future enhancement.

19. Are there future plans for a foreign vendor payments section? Currently it's handled via email.

Thank you for the suggestion. We will share this with our development team for consideration as a future enhancement.

20. Does RCUH provide training on the Financial Portal for new employees?

RCUH will collaborate with Fiscal Administrators to provide Financial Portal training to project staff. FAs may request assistance by emailing rcuh@rcuh.com.

If you have any other questions on Financial Portal 2.0, please contact RCUH Accounting at rcuh_accounting@rcuh.com.