iStrategy Training

Georgia Perimeter College
Agenda

• Introductions and Course Objectives
• User Ids, Login Compatibility Mode
• iStrategy Course
  – Data Mapping and Organization Slides
  – Department Level Security
• Q&A
URL and Login Information

- https://frweb.usg.edu
- Compatibility Mode
Data Available

- Updated Nightly From PeopleSoft Financials
- FY 2006 through 2015
- Controlled Budgets, Commitment Control, GL Journals, AP Detail, PO Detail, Vendors, and now Payroll Detail (PERS_SERV_BOR).
- Descriptions from related tables (Account, Department, Fund etc.).
Data Hierarchies

- Account – central
- Fund – central
- Program, Class - central
- Department – institution
  - XXX_BI_DEPARTMENT
- Project - institution
- Alternative Reporting
Organization of Data in iStrategy

• Perspectives
  – Budget Management, Accounts Payable, PO, Payroll, Position
    (Currently all reports based on Budget Management)

• Dimensions
  – Fund, Account, Program, Class, Department, Budget Ref, Project, Fiscal Period --- also Vendor, Position

• Facts
  – Journals, Vouchers, PERS_SERV_BOR, POs – something with a dollar amount attached

• Measures
  – Budget, Actuals, Encumbered Amt, Remaining Budget, YTD Actual, PYTD Actual, % Budget Utilized
Source of Data in iStrategy

Hierarchy
From department Tree in PSoft

KK_ACTIVITY_LOG
Ledger = APPROP_BD

Calculated Field = Budget - Open Enc - Actual

Calculated Field = (Actual + Open Enc)/Budget

JRNL_HEADER and JRNL_LN,
Header Status = P, U
KK_AMOUNT_TYPE = 1, 7
Ledger = ACTUALS
Please send comments or questions to:
Jamie.Fernandes@gpc.edu
Amy.Jurgens@gpc.edu

THANK YOU!