Finance – TechnologyOne Cloud Upgrade

Finance – TechnologyOne is scheduled to be upgraded on the weekend of 20/21 October 2018. This upgrade involves moving the platform supporting the system, to the ‘Cloud’.

In the main there is little change to the functions within the Finance TechOne system however, there are some changes that affect all users therefore, it is important you read this document so you are familiar with the changes that come into effect after the upgrade.

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How do I access TechOne Finance systems?

Access to Finance systems is via one application “Technology One” on your Okta dashboard. Once within the Technology One application, Finance modules will be available. Click on the appropriate module in the ‘Ci in the Cloud’ panel.

Any browser can be used, and Citrix is no longer required.

If you do not have the Technology One application on your Okta dashboard, you will need to apply to be a user via IDS helpdesk (ids@flinders.edu.au) or via the AssystNet application on your Okta dashboard.

To access TechOne Financials, Please click on the below icon from your OKTA dashboard.

Click on Core Enterprise Suite to access Technology One Financial System.

How to turn the Pop-up Blocker on or off

Block or allow pop-ups from a specific site

1. On your computer, open browser
2. Go to a page where pop-ups are blocked.
3. In the address bar, click Pop-up blocked.
4. Click the link for the pop-up you want to see.
5. To always see pop-ups for the site, select Always allow pop-ups from [site] Done.
6. Also you may go to the browser settings and turn off the Pop-up Blocker.

How to copy/paste

Copying text between the desktop and a Student or Finance window needs to go via a new clipboard function, accessed from the top of the window.

At the top of the application window there are 3 new icons accessed via a pull down menu.

Pull down menu:

Use the pull down menu to display the following icons

New Icons:
1. Copy from desktop to server
2. Clipboard
3. Copy from server to desktop

How to print in the cloud

Scenario 1: How to do print screen.

1. Click on the printer icon as you can see in the below screen –

2. Then again click on the Print icon –
3. A printer page would appear, just click on Print to printout the page.

Scenario 2: How to print purchase order

Step1: Select the Requisition you need to print by highlighting the row (as shown in below snapshot).

Step2: Click on Release and Print Order (as shown in below snapshot).
Step 3: Click on Retrieve (as shown in below)

Step 4: Select the row by ticking the check box against that row (as shown in below)

Step 5: Click on Release and Print Selected Orders (as shown in below)
Step 6: Below window will appear after performing the Step 5.

Step 7: Now select the Print option by ticking the box and removing any ticks against any other box. Printer Name would be by default **CLOUDPRINTER**. Now click on OK button.

Step 8: Below screen would appear with message showing “Your Purchase Order is ready to be viewed”. Click on it.
Step 9: This will open the PDF document in your browser as shown below, now you may print it.

How to run Assets crystal reports

1. Open existing Asset report
2. Expand the Output Options and select the Format option (usually pdf)
3. The report will open in another tab from where it can be saved to your local drive

How to upload a journal from a spreadsheet

1. Create an Excel Template with below required fields and data
4. In the GL Entry → for example click on the ‘General Journal (GLJN).

5. Below screen would appear once performed the above step –

6. Now copy the selected area as shown in the below snapshot-
7. Paste this in the clipboard of TechnologyOne –

Once pasted in the clipboard then click on close to close the clipboard window.

8. Then highlight the first cell on the ledger (which is a starting point for copy / paste). Now click on edit to ‘paste special’ the data in the Journal.
9. Once pasted the data the following screen would appear. **Note:** Do not navigate the page or browse any other application while the paste special process is in place.

**How authorised staff can access and view server folders**

To access and view server folders user needs to follow the below steps –

1. **Click on the search box and type ‘**Server Folder Viewer**’ and enter**

2. **Below are the folders locations which can be located based on the requirement –**
3. ‘Sub-folder’ highlighted in Yellow shows where the file resides.

4. Folder Location where you can view your file.
How authorised staff can open, edit and save XLOne reports

1. Search for Server Folder Viewer in the TechOne Search
2. In the Search enter $EXCL_US and click on Retrieve
   a. Select $EXCL_US

   a. Now select the file which you want to open
   b. Click on Local Sync (you can find this in your left window pane – Under actions to perform)
   c. Now go to Search (you can find this in your left window pane), type XLONE REPORTING as search criteria (screenshot below)
   d. Double click on XLONE REPORTING
e. Now click on File Menu → Computer → Browse
f. Select the file which you had local Sync under the below path.

![File selection](image)

g. Double click on the file and open it.
h. Make changes as required.
i. Now save the file by clicking File Menu → Save.

How to upload files from desktop/PC to cloud environment

1. Select the file from desktop or PC which you want to upload into Cloud.
2. Go to TechnologyOne into cloud and click on the search box and type ‘Server Folder Viewer’ and enter

![Server Folder Viewer](image)
3. Double click on Server Folder Viewer and search for the folder location

4. Now drag the file which you have selected on desktop or PC and drop into the cloud folder.

5. Now the file copying process from desktop or pc to cloud is complete.

How to open and see Basware attachments

1. Click on the attachment link in the transaction listing screen
2. The attachment will open in another tab

How to view DP Jobs

1. Click on View Tab and Click on My Server Jobs.
Journals and purchase requisition workflow

You can continue to action journals and purchase requisitions workflow items from My Workflow as per usual.

Please note that Resource Pool options has been removed from the workflow. To assign next user when submitting a document for approval please select the most appropriate person from the search list.

Who to contact for support

ids@flinders.edu.au