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State Software Advisory Committee

Last October, the newly formed *State Software Advisory Committee* met for the first time defining its purpose/mission as an advocate for State Software users. This group is comprised of the SSDT senior staff, two ITC Directors, a representative from each ITC—either an ITC or district fiscal professional, a representative from the User Acceptance Testers and the Redesign Project Manager. Committee members formed three working groups that will help prioritize development work, assist with reporting needs and collaborate on training, support and documentation.

Prioritization Working Group

This group meets monthly with the SSDT USPS-R and USAS-R Project Managers to discuss completed work issues and more importantly to discuss new issues and establish priority ranking for upcoming software releases.

Reports Working Group

The reports working group main purpose is to focus on efforts to satisfy Redesign reporting needs. The group meets monthly and is currently in the process of reviewing uploaded report definitions in order to publish them to a public site so Redesign users can import them and use them at their districts.

Support, Documentation and Training Working Group

Communication efforts is a huge priority for this working group as well as providing software documentation materials and training to ITC Fiscal staff and district personnel. This newsletter is one way of reaching out and communicating to districts on the status of the Redesign as well as provide helpful articles on the latest enhancements or features made to the software. The working group has come up with the idea of a 'Shared Training and Implementation Documents' repository for ITC Fiscal Support Staff that allows them to share implementation or training checklists, guides or materials their ITC has created with other ITCs in order to help aid in the migration effort.

Teamwork makes the dream work!

Keeping Connected during Wave 3

A bi-weekly 'touch-base' webinar is attended by ITC fiscal staff, the SSDT and User Acceptance Testers in a collaborative environment that provides a forum for sharing implementation status reports, tips and tricks for Wave 3 districts. ITC fiscal staff may also bring to the table any questions or current issues they are having with their Wave 3 implementation giving them a chance to touch-base with the SSDT and other ITCs on the progress of the Redesign efforts.

USAS-R Account Filters on Reports

The newest USAS-R update makes it easier than ever for districts to utilize the Account Filter feature. The basic use of the Account Filters is to limit users to specific accounts for their affiliated building or program. USAS-R takes this Classic feature to the next level. Account Filters can be used to easily filter reports on the fly!

The Account Filter option can be found on the Utilities menu. When adding a new Filter, the data entry page will allow users to enter multiple accounts to each filter much like the Classic USASEC program. These filters can be created for broad groups of accounts or just a few specific accounts depending on how many fields of the account code are entered. To create a filter for all accounts in specific funds enter just the TI, Fund, and SCC like in the example below. For Account Filters that are created to be used on Reports, the check box for R (Read Only) can be selected for each account line. Once all accounts are entered, give the Filter a name and click Save.


SSDT Account Summary Reports have been updated to include a Query Parameter field where the Filter Name can be entered. Simply type in the Account Filter name into this field and click Generate Report. USAS-R will look up the accounts entered for that Account Filter and produce a report that only includes figures for the matching accounts.

Current Migration Map

ACCESS
CONNECT
HCC
LACA
LGCA
META
MVECA
NCOCC
NEOnet
NOACSC
NOECA
NWOCA
OMERESA
SWOCA
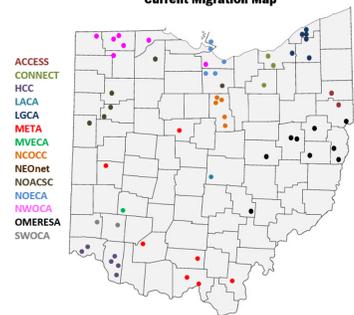
Query Parameters

Include Full Account Code (i.e. 001-1100-500-0000)	
Include Fund (use % for wildcard)	
Include Func (use % for wildcard)	
Include Obj (use % for wildcard)	
Include SCC (use % for wildcard)	
Active only? (true/false)	
Filter Name	Grants

[⬇ Generate Report]

[⊙]

The Filter Name option can also be added to Custom Reports. There is no limit to the number of Account Filters you can create. Think about creating Filters for Grants, Buildings, Departments and Activities!

REDESIGN STATUS

22 Sites Live on Redesign	38 Total Wave 3 Sites
14 Participating ITCs	