

The Financial Edge WebPortal Planning Checklist

With the introduction of **The Financial Edge** WebPortal, we are extending the power of **The Financial Edge** to the web!

- With **The Financial Edge** 7.77 release in Q4 2008, WebPurchasing allows users to create and approve requisitions online. WebPurchasing replaces eRequisitions.
- With **The Financial Edge** 7.78 release in early 2009, WebInvoicing will allow users to request and approve reimbursement and check advances online. WebInvoicing will be provided free of charge to clients who currently pay maintenance for eRequisitions.

Transitioning to the WebPortal requires careful planning. Please review the checklist below as a guide. When you have completed the steps, contact your account manager at solutions@blackbaud.com or call 800.443.9441 to request WebPurchasing and/or WebInvoicing.

WebPortal Planning Checklist

1. Have you allowed enough time for the transition?	
Yes!	<ul style="list-style-type: none"> • Plan your transition when you and your staff can devote sufficient time to it. The WebPortal offers many new features you may want to implement. You will also need time for users to become acclimated to the new website and online process.
2. Have you prepared a pre-transition plan?	
Yes!	<ul style="list-style-type: none"> • Read the Installation Guide to learn about new technical features, such as a new configuration utility. • Read the WebPurchasing User Guide to learn about new functionality, such as approval rules and one-time products. It includes implementation considerations and detailed steps for setting up WebPurchasing. • When available in 2009, read the WebInvoicing User Guide to learn about new functionality, such as creating invoice requests and adding attachments.
3. Have you prepared your data for the transition?	
Yes!	<ul style="list-style-type: none"> • If you use eRequisitions, before updating to 7.77, consolidate all requisition line items into purchase orders in The Financial Edge. This is critical. • Important note: You must update to 7.77 prior to processing 2008 1099s and W2s from The Financial Edge. • Remove any items left in a user's shopping cart.
4. Have you prepared a post-transition plan?	
Yes!	<ul style="list-style-type: none"> • Re-review the user guides and share them with your users. • If you use eRequisitions, ensure these steps are followed immediately after installing WebPurchasing: <ol style="list-style-type: none"> 1. Verify WebPurchasing users' passwords meet the new password requirements. Passwords must be eight alpha-numeric characters. 2. In Security, verify groups' and users' security permissions. Several options have changed. Security groups are very important to the new approval rule functionality. 3. Create approval rules to automate your approval workflows. 4. Review Business Rules in Configuration. Several options have changed. 5. Define table entries in the Rejection Reason and Cancellation Reason tables. 6. If the website address changes, send the new URL to users. 7. Ask users to recreate their My Account information and Favorites.

5. Have you ensured your organization meets system recommendations?	
Yes!	<ul style="list-style-type: none"> • Review the current system recommendations for the WebPortal with your technical staff. • Microsoft .Net 3.5 will be installed if it is not already. • WebPurchasing and WebInvoicing are supported only on Internet Explorer 7 or Firefox 2 or 3 (PC and Macintosh). • The WebPortal’s web server is supported only on Windows 2003 Server or Windows 2008 Server.
6. Have you determined your training needs?	
Yes!	<ul style="list-style-type: none"> • You may need training/consulting if you are implementing WebPurchasing or WebInvoicing for the first time and need advice on setting up the system.
7. Have you determined the number of user licenses you will need?	
Yes!	<ul style="list-style-type: none"> • Licenses are managed on a concurrent basis. For example, if you buy 5 WebPurchasing user licenses, 5 users can log in concurrently. The same number of licenses purchased with eRequisitions will be used with WebPurchasing. These licenses do not affect The Financial Edge user licenses. • If you have both WebPurchasing and WebInvoicing, licenses will be shared between the products. For example, 8 users can log into WebPurchasing and 2 users can log into WebInvoicing.