



Institutional Readiness Web Conference Call

May 23, 2007

"Creating A More Educated Georgia"



Agenda

- What does that mean?
- Scorecard
- You Spoke, We Listened...
- Training Update
- UPK Demonstration
- Survey



What does that mean?

Go-Live!	The date of final changeover from the current version of PeopleSoft Financials to the new version 8.9. Go-Live is technically the extended weekend that OIIT takes the Production databases down with the expectation that when the databases are brought back up, they will be at the new version 8.9.
UAT	User Acceptance Testing User testing of critical business processes in an upgraded, pre-production copy of their database. Users must test and sign off on these processes within the specified time period.
UPK	User Productivity Kit A browser-based training tool which offers multiple modes of use to provide simulated instruction and re-enforcement of learning to a PeopleSoft user. UPK is one of the training delivery mediums of the PSFIN V8 Project.
IR	Institutional Readiness

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PSFIN V8 Project Success Scorecard

Success Criteria		Meets Criteria Once the system is implemented:	Falls short of criteria or inconsistently meets criteria Once the system is implemented:	Does not meet criteria Once the system is implemented:
1. Improved Functionality		Documented improvements in functionality in every module AP, GL, AM, PO, BudgetPrep	Documented improvements in functionality in 4 modules	Documented improvements in functionality in 3 or fewer modules
2. Fewer Modifications		Reduce the current number of modifications by 30%	Reduce the current number of modifications by less than 30 but more than 15%	Reduce the current number of modifications by less than 15%
3. Institutional Readiness	a .	33 institutions indicate ready on readiness checklist	32 institutions indicate ready on readiness checklist	31 or fewer institutions indicate ready on readiness checklist
	b .	33 institutions participate every month in Institutional Readiness calls	32 institutions participate every month in Institutional Readiness calls	31 or fewer institutions participate every month in Institutional Readiness calls
	c .	33 institutions have changed their business procedures (business procedure are activities in a job function prior to PS) to take advantage of PS 8.9 best practices	32 institutions have changed their business procedures (business procedure are activities in a job function prior to PS) to take advantage of PS 8.9 best practices	31 or fewer institutions have changed their business procedures (business procedure are activities in a job function prior to PS) to take advantage of PS 8.9 best practices
	d .	33 institutions have at least one Super User designated and trained to provide End User support	32 institutions have at least one Super User designated to provide End User support	31 or fewer institutions have at least one Super User designated to provide End User support
4. Trained Users	a .	33 institutions have at least one Super User designated as a Trainer	32 institutions have at least one Super User designated as a Trainer	31 or fewer institutions have at least one Super User designated as a Trainer
	b .	33 institutions have at least one Super User trained in each module in Super User Workshops	32 institutions have at least one Super User trained in each module in Super User Workshops	31 or fewer institutions have at least one Super User trained in each module in Super User Workshops
	c .	33 institutions trained their End Users	32 institutions trained their End Users	31 or fewer institutions trained their End Users
	d .	75% of Traditional End Users from each institution participated in End User Training	60-74% of Traditional End Users from each institution participated in End User Training	Less than 60% of Traditional End Users from each institution participated in End User Training
	e .	75% of Non-Traditional End Users from each institution participated in online learning	60-74% of Non-Traditional End Users from each institution participated in online learning	Less than 60% of Non-Traditional End Users from each institution participated in online learning



You Spoke, We Listened

You Spoke	We Listened
You requested more information on the training strategy.	We conducted three Training Road Shows throughout the system to listen to your concerns about the training strategy, communicate the training strategy in more detail, and demonstrate the UPK.
You requested more information specifically related to technical issues.	We created an agenda focused on technical topics for the Quarterly Update Meeting scheduled for Wednesday, August 29, 2007.
You requested a UPK demo so Campus Coordinators could show this to the appropriate people at their institutions.	We are presenting a demonstration of the UPK player tool during this meeting today.
You requested that a sample UPK topic be posted to the PSFIN web site so users could review this directly whenever they had the time.	A sample UPK topic – Purchasing, Budget Check a PO Online – has been posted to the website. This sample uses actual institution data. Go to http://www.usg.edu/gafirst/fin/training/
You requested making UPK content available to Certified Trainers as soon as possible so they could begin training their users, especially the non-traditional ones, early.	We will begin making UPK content available in October instead of December as originally scheduled. This will include Expenses, eProcurement, and module-specific critical processes that will be tested during the User Acceptance Testing (UAT) period.



Training Update

Michael Barnwell

Training Subteam lead

Jeanne Katz

Training Consultant

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Training

- Certified Trainer by June 15
 - Participate in June IR call on June 20
 - Scorecard measure 4a

- Super User support July 6
 - Provide end user support at the institution
 - Scorecard measure 3d



Training

- Super User per module
 - Scorecard measure 4b
- Modules
 - AM
 - AP / Expenses
 - ePro / PO
 - GL
 - Budget Prep / Commitment Control
 - AR (USO, Skidaway)

July 6



UPK Training Tool

Demonstration

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UPK Demonstration

- Explanation



UPK Samples on the Web

GeorgiaFIRST/Financials: Training v8.9

Click on the link below to launch the sample UPK Player. When it opens, expand the "Purchasing SAMPLE" module, then expand the "Processing Purchase Orders" lesson. Click on the "Budget Check PO Online" topic. Click on one of the three playback modes at the top:

See It! Mode

Provides simulated instruction.

Try It! Mode

Provides interactive practice to reinforce learning.

Do It! Mode

Allows you to step through the business process visually as you work in the PSFIN V8 environment (when available). Do It! mode is great for real-time recall of the steps to take to complete the Business Process.

Sample UPK Player

Sample Job Aid (PDF 20k)

Sample Training Guide (PDF 116k)

Sample Instructor Manual (PDF 120k)

A sample Business Process will be available soon.



Calendar

- IR Meetings
 - June 20, Wednesday
 - July 26, Thursday
- Quarterly Update Meeting
 - August 28, Tuesday
 - Includes IR meeting
 - Draft of Agenda is online – need your feedback



IR Calls

Chelle Stringer

- Monthly Assessments related to Scorecard
- Phone Calls to Campus Coordinators
- Georgia Summit interviews and meetings