

PSFIN V8 Project

Institutional Readiness Call

March 21, 2007



OIIT Staff in attendance

- Michael Casuccio – Communications
- Chelle Stringer – Institutional Readiness
- Sharon Logan – Project Manager
- Deidre Crawford – Functional Lead
- Liz Johnson – Technical Support for HWLC
- Dave Disney – Director of Customer Services

Monthly Assessments

- Progress toward items on Project Success Scorecard
- Institutional Readiness Checklists are an item on the Project Success Scorecard
 - Monthly IR checklists
 - Tasks to be completed by institutions

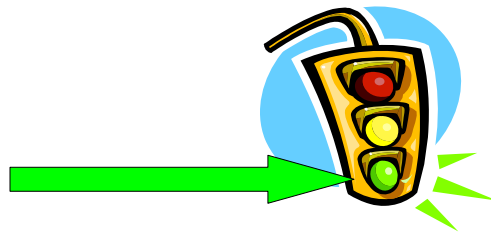
Institutional Readiness

Meets criteria	Falls short of criteria	Does not meet criteria
33 institutions indicate ready on Institutional Readiness checklists	32 institutions indicate ready on Institutional Readiness checklists	31 or fewer institutions Indicate ready on Institutional Readiness Checklists
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

February IR Checklist

- Data Cleanup
- IR Web Conference Call
- Learner Characteristics Survey

GREEN!!!!!!



March IR Checklist

- March IR call
 - ☐ At least one representative from each institution should participate – Wednesday, March 21
- Data Cleanup
 - ☐ Verify pay cycles (submit ticket) – March 31
 - ☐ Outstanding vouchers (submit ticket) – March 31



Data Cleanup

- All sites have reported running the clean up reports and scripts
- Prior year data will be upgraded as is, with the following exceptions that we currently know about:
 - an identifier will be placed on each "stuck" record that will be upgraded
 - unposted budget journals may be deleted via the delivered online functionality (manual)
 - AM data will be handled as per the current process developed and being implemented by the AM lead (DBI)



Data Cleanup

- FY07 data will be cleaned up via the usual process (manual/functional or DBI where necessary)
- OIIT will periodically validate data cleanup tasks
- Only need to run the queries or reports designated in the step by step instructions
- Add these steps to your month end checklists

Data Cleanup

- Data cleanup is a continuous process
 - From this point forward, each institution run through the instructions and clean up the data as needed once per month until Go Live
 - Ensure that your production data remains clean
 - Will minimize problems when we transition to new version of PS Financials

Next Month

- Training Road Show
 - Attend one of three:
 - March 27 in Athens at OIIT
 - March 28 in Cochran
 - April 11 in Savannah
- Quarterly Update Meeting
 - Monday, April 16, 2007 – 9am to 4pm
 - Submit list of attendees by April 9
 - Includes April IR call
 - Technical Items ? ? ?



Future Events

- IR Web Conferences
 - ☐ 5/23/07
 - ☐ 6/20/07
 - ☐ 7/25/07
- August 28, 2007 Technical Update
- November 8, 2007 Quarterly Update



Concerns or Uncertainty

- Expenses will be covered at the Quarterly Update meeting in April and April IR call
- What are your most pressing concerns about the PS V8 project?
 - ☐ We can only address it if we know about it
 - ☐ We want you to be successful, help us help you.

