



Institutional Readiness Web Conference Call

April 23, 2008



Wimba update

- New Version of Wimba Classroom
- If you can not hear us...
 - Make sure your speakers & computer are not muted
 - Make sure the volume is turned up on both the computer & the speakers
 - Call the Wimba customer support line at 866-350-4978



Agenda

- Training Update
- IR Tasks



Training

Michael Barnwell



Training

- Recommending UPK Player as the primary tool for training Expenses Self-Service users
- Vovici tool used for usage tracking for Expenses Self-Service and ePro users
- GeorgiaVIEW Vista will be used for tracking all other training



Training

- Reporting of usage tracking will be performed by OIIT on a regular basis
- Certified Trainers update training plan by 06/20/08, including dates and times of instructor led classes and/or workshops
- Certified trainer Webinar 06/30/08



Training

- Databases for end user training at institutions
- No databases will be available the week of 9/1/08 - 9/5/08
- Group 1 Super User Training begins 07/28/08



Training

- Group 2 Super User Training begins 08/25/08
- Certified Trainers must attend at least one Super User Training course



IR Tasks – Monthly (On Going)

- Active Employees, Core Financials Users, and Self Registration
 - May 30, 2008 – All employees
 - Monthly after May 30 – New employees
- Data Cleanup Document
- Month End Close Checklist



IR Tasks - April

- Super User Training Closed Registration
 - Ended on 04/18/08
 - Open Registration Starts May 5 for both groups
 - Limited space, so register as soon as possible

Note: Make travel reservations for Athens – Go Live weekend is on a UGA game day, so hotels fill up fast



IR Tasks - May

- Swiftview for AP & EX check printing
 - On computer of person who is going to do this in production
 - Due: 05/16/08
- Bank approval of Checks, positive pay, EFT & ACH
 - Verify that bank accepted checks and key files
 - Forward verification to Donna Wooddell
 - Due: 05/16/08

Note: A spreadsheet template will be distributed to assist in accumulating department and project approvers



IR Tasks - May

- Identify Key Users
 - Workflow, Expenses, ePro and Chartfield Administrator
 - Chartfield Administrator
 - AP Auditor
 - Due: 05/16/08
- Define Expense Workflow Configuration Option
 - # of Department Approval Levels
 - Due: 05/16/08
- Self Registration (Existing Employees) Complete (5/31/08)

Note: A spreadsheet template will be distributed to assist in accumulating department and project approvers



IR Tasks – June

- Register for Security Workshop
 - 6/1/08
 - Associate Users with Roles
 - Configure Departments and Project Managers
 - Configure Expenses Workflow
 - Define User Preferences
- Submit Updated Training Plan
 - Due: 6/20/08



IR Tasks – June

- Accumulate Workflow Approvers and Alternate Roles
 - Expenses Department Manager
 - eProcurement Department manager
 - Expenses Project Manager
 - eProcurement Project manager
 - Delegates for Expense Data Entry
 - Designates for Expense Approval
 - Expense Reviewers
 - Due: 06/27/08

Note: A spreadsheet template will be provided by OIIT to capture this critical information.



IR Tasks - July

- IR web conference
 - Pre-Production Deployment Checklist
 - Review high-level tasks that need to be completed by pre-production
 - Expectations for people coming to Athens for pre-production cutover
 - 7/16/08
- Group 1 Super User Training Open Registration
 - Ends: 7/23/08

Note: Prepare Security Request Form & Approval Worksheets. Submit Approval Worksheets to OIIT 2 weeks prior to Security Workshop. Be sure to bring completed security request forms to security workshop.



IR Tasks - July

- Complete institutional development of queries in FPLAY89
 - Due 7/25/08
- Group 1 Complete Pre-deployment Checklist
 - Due: 07/25/08



IR Tasks - August

- Group 1 - Pre-Production upgrade
 - Campus Upgrade Reps in Athens August 3, 4, 5
- Group 1- PSFIN V8 Security Workshop
 - 08/06/08
 - Security Request Form (available June 1)
 - Note: Self Registration in HRMS must be complete in order to grant security in Financials



IR Tasks - August

- Group 1 - Finalize Local Business Processes and Documentation
 - Revise model business processes to your institution (as needed)
 - Due: 08/06/08
- Group 1 - Complete communications to local campus users
 - URLs
 - Business Processes
 - UPK
 - Help Desk Procedures
 - System Availability
 - Other?
 - Due: 08/15/08



IR Tasks - August

- Group 1 – Verify technical architecture
 - Firewall
 - Email
 - Banner Links (non hosted institutions)
 - Due: 08/21/08
- Group 1 - IR web conference call
 - Review Deployment Checklist
 - 08/20/08
- Group 2 Super User Training open registration
 - Ends: 8/20/08



IR Tasks - August

- Group 1 - Complete Deployment Checklist
 - Close all vouchers, POs, requisitions, cash advances, etc...
 - Due: 08/27/08
- August Close
 - Due: 08/26/08
 - (FDM submission to be determined)



IR Tasks - September

- Group 1 - Campus Upgrade reps in Athens for Go-Live production upgrade
 - 08/31/08 – 09/02/08 (Labor Day Weekend & UGA Home Game)
 - Go Live – 09/03/08!



IR Tasks - September

- Group 2 - Complete Pre-deployment Checklist
 - Due: 09/03/08
- Group 2 - Pre-Production upgrade
 - Campus Upgrade Reps in Athens 09/07/08 – 09/09/08
- Group 2- PSFIN V8 Security Workshop
 - Due: 9/10/08
 - Security Request Form (available June 1)
 - Note: Self Registration in HRMS must be complete in order to grant security in Financials



IR Tasks - September

- Group 2 - Finalize Local Business Processes and Documentation
 - Revise model business processes to your institution (as needed)
 - Due: 09/10/08
- Group 2 - Complete communications to local campus users
 - URLs
 - Business Processes
 - UPK
 - Help Desk Procedures
 - System Availability
 - Other?
 - Due: 09/19/08



IR Tasks - September

- Group 2 - IR web conference call
 - Review Deployment Checklist
 - 09/24/08
- Group 2 – Verify technical architecture
 - Firewall
 - Email
 - Banner Links (non hosted institutions)
 - Due: 09/26/08
- September Close
 - Due: 09/30/08 (FDM submission to be determined)



IR Tasks - October

- Group 2 - Complete Deployment Checklist
 - Close all vouchers, POs, requisitions, cash advances, etc...
 - Due: 10/01/08
- Group 2 - Campus Upgrade reps in Athens for Go-Live production upgrade
 - 10/05/07 – 10/07/08
 - 10/08/08 – Go-Live



IR Tasks

- Master Task List
 - Updated list will be distributed and posted to the web this week
 - <http://www.usg.edu/gafirst/fin/project/v8/news/weekly/>



Questions



"Creating A More Educated Georgia"



Calendar

- Quarterly Update Meeting
 - June 18 Macon
 - Half day agenda: 10:00 am – 1:00 pm



- This meeting will be archived by the end of the day.
 - Sign into Wimba
 - In the Lobby, Go to the Archive tab
 - A link will be emailed to you.



Need Help?

- GeorgiaFirst website
 - <http://www.usg.edu/gafirst/fin/project/v8/>
- Email
 - Psfin_upgrade@usg.edu