



v8 PSFIN V8 Project
PeopleSoft Financials Version 8.9

Institutional Readiness Web Conference Call

July 19, 2007

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Agenda

- Role of Campus Coordinator
- IR Tasks
- Go-Live! Groups
- UAT
- Upcoming Events

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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	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	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
	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 asked us to try to find a way for more than two people per module to attend the Super User training, yet still make training flexible enough to meet the needs of those needing to be trained in more than one module.	After careful planning, OIIT is announcing that each institution can send three people per module to Super User training.

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Campus Coordinators

- **Your Role**
 - **Distribute project announcements**
 - to those at your institution with a stake in the project
 - **Delegate Institutional Readiness tasks**
 - To the right person at your institution
 - **Ensure Institutional Readiness tasks are completed on time**

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Campus Coordinators

- **Ask questions, raise concerns, and propose solutions on behalf of your institution**
- **Act as the go to person for 8.9 at your institution**

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Institutional Readiness Tasks

- Support Scorecard item 3a
- Completing Institutional Readiness tasks will ensure that institutions have a smooth transition from 7.5 to 8.9
- Not completing tasks puts the institution at risk of problems during cut over

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Training Tasks

- **RED-[3d]** Turn in names of Super Users who will provide end user support at your institution (July 6)
- Provide feedback and questions regarding the Training Plan Template (July 19)

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Training Tasks

- Submit first draft of Training Plan (August 6)
- Review, validate, and return list of non-traditional expenses users (August 10)
- Provide list of non-traditional eProcurement users (August 10)

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Training Tasks

- Provide a list of traditional end users per module (August 10)
 - Accounts Payable
 - Asset Management
 - Budget Prep
 - General Ledger
 - Purchasing
 - AR (USO and Skidaway)

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Security Tasks

- **RED-** Provide a list of all active employees, employee ID, and self service or current user ID (June 22)
- Send procedures or step-by-step instructions for adding and deleting employees/users in 7.5 (July 18)

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Development Tasks

- Provide # of institution-created **queries** that you plan to carry forward into PS financials 8.9 (August 24)
- Provide # of institution-created **SQRs** that you plan to carry forward into PS financials 8.9 (August 24)
- Provide # of institution-created **Crystal and nVision reports** that you plan to carry forward into PS financials 8.9 (August 24)

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Groups

GROUP 1

March 4, 2008

Armstrong
Augusta State
Bainbridge
Clayton
Columbus
Darton
Fort Valley
Gainesville
Georgia College
Georgia Gwinnett College
Georgia Highlands
Georgia Perimeter College
Georgia Southern

Middle Georgia
Southern Poly
USO

GROUP 2

April 7, 2008

ABAC
Albany
Atlanta Metro
Coastal
Dalton
East Georgia
Georgia Southwestern
Gordon
Kennesaw State
Macon State
North Georgia
Savannah State
Skidaway
South Georgia
Valdosta
Waycross
West Georgia



User Acceptance Testing

- Group 1 ~~10/29 – 11/16~~ → 11/12 – 12/07
- Group 2 ~~11/26 – 12/14~~ → 12/17 – 1/18
- Each school will have an updated version of their database
- The first day of every week of UAT will be training on 8.9
- Detailed dates are tentative

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User Acceptance Testing

- Week 1

- Day 1 Training
 - Day 2 Budget Prep
 - Day 3-5 ePro and PO
- (AR will be handled with the 2 sites that use AR)

- Week 2

- Day 1 Training
- Day 2-5 AP and Expenses

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User Acceptance Testing

- Week 3

- Day 1 Training
- Day 2 AM
- Day 3-5 GL, Commitment Control

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Calendar

- Quarterly Update Meeting
 - **August 29, Wednesday**
 - Includes IR meeting
 - Draft of Agenda is online

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Calendar

- Georgia Summit
 - September 19-21
 - Includes IR meeting
 - Individual Institution Interviews with Chelle Stringer

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Need Help?

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

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