



Institutional Readiness Call

February 21, 2007



Ground Rules

- Please “raise your hand” if you would like the opportunity to speak
- You may use the chat at anytime to submit a question or comment.
- Questions may be address after the meeting via the email list or telephone call.
- We may not be able to address all of your questions and comments during the meeting, but they all will be addressed.
- {questions via chat}
- Use of the CTRL key and multi-tasking.



Purpose

- Two-way communication
 - We need your reactions, questions, comments
- Clarify
 - Words mean “stuff”—They don’t always mean the same “stuff” to different people.
- Expectations
- These IR meetings are mandatory



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



Improved Functionality

Meets criteria	Falls short of criteria OR inconsistently meets criteria	Does not meet criteria
Documented improvements in functionality in every module (AP, GL, AM, PO, BudgetPrep)	Documented improvements in functionality in four modules	Documented improvements in functionality in three or fewer modules



Fewer Modifications

Meets criteria	Falls short of criteria OR inconsistently meets criteria	Does not meet criteria
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%



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



Weekly Update announcements

- <http://www.usg.edu/gafirst/fin/project/v8/news/weekly/>



GEORGIAFIRST
FINANCIAL, INFORMATION & REPORTING SYSTEMS FOR TOMORROW
A Project of the University System of Georgia



PSFIN V8 Project
PeopleSoft Financials Version 8.9

A Publication of the OIIT PeopleSoft Financials Production Support Group

PSFIN V8 Project Weekly Update for 02/05/2007

To:	Technical Reps, cc to Campus Coordinators
Subject:	PSFIN V8 Project Technical Survey
Message:	<p>The PSFIN V8 Project team has created a survey to help assess the volume and the nature of local Financials development work at your campus. The purpose of this survey is to better enable OIIT to meet your local development needs.</p> <p>The Technical Representative at each institution should complete this survey. The survey is located at the following URL:</p> <p>http://www.surveys.usg.edu/se.ashx?s=06C2C3B95DE4E16B</p>
Action Required:	Log on to the above URL and complete the survey. The survey is open and available to have responses submitted as of February 5, 2007.
Deadline:	Please submit your institution's responses no later than COB Friday, February 16, 2007.
Respond To:	For questions about completing this survey, you may email psfin_upgrade@usg.edu .
For More Information:	<ul style="list-style-type: none">• Visit the PSFIN V8 Project web site at: http://www.usg.edu/gafirst/fin/project/v8/• Contact the PSFIN V8 Project team at: psfin_upgrade@usg.edu



Institutional Readiness

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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



Institutional Readiness

Meets criteria	Falls short of criteria	Does not meet criteria
33 institutions have changed their business procedures to take advantage of PS 8.9 best practices (Business procedures Are activities in a job Function prior to PS)	32 institutions have changed their business procedures to take advantage of PS 8.9 best practices	31 or fewer institutions have changed their business procedures to take advantage of PS 8.9 best practices



Trained Users

Meets criteria	Falls short of criteria	Does not meet criteria
33 institutions have at least one Super User designated as a Trainer	33 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
33 institutions have at least one Super User designated 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



Trained Users

Meets criteria	Falls short of criteria	Does not meet criteria
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
33 institutions trained their End Users	32 institutions trained their End Users	31 or fewer institutions trained their End Users



Trained Users

Meets criteria	Falls short of criteria	Does not meet criteria
75% of End Users from each institution participated in End User workshops	60 - 74% of End Users from each institution participated in End User Workshops	Less than 60% of End Users from each institution participated in End User Workshops
75% of End Users from each institution participated in online learning	60 – 74% of End Users from each institution participated in online learning	Less than 60% of End Users from each institution Participated in online learning



February Institutional Readiness Checklist

- V8 Project Technical Survey – due 2/16
- Data clean up
 - PO clean up of prior year data and data through January 2007 - due 2/23
 - AM clean up of prior year data and data through January 2007 – due 2/27
 - Vendor clean up – due 2/28
 - GL clean up of prior year data and data through January 2007 – due 2/28



February Institutional Readiness Checklist

- AP clean up
 - ☐ Budget checking vouchers – due 2/28
 - ☐ Close PO vouchers – due 2/28
 - ☐ Bank reconciliations – due 2/28



Next Web Conference Call

- Wednesday, March 21, 2007