



PeopleSoft 8.9 Financials Upgrade



Workflow!

Preparing for Your Security Workshop



Session Objectives



- Identify tasks to complete before Security Workshop
 - *August 6 – Group 1*
 - *September 10 – Group 2*
- Review milestones
- Discuss tasks due in May and June
- Answer questions



Workflow Tasks



- Identify users to perform generic jobs
- Identify ePro department approvers
- Identify ePro project approvers
- Conduct Self Registration
- Perform User ID clean up



Workflow Tasks (cont'd)



- Identify Expense Approvers
 - Department Level 1
 - Department Level 2
 - Project Managers
 - Reviewers
 - AP Auditors
- Configure System



Schedule Overview



Task May June July August September October

Identify users to perform generic jobs						
Identify ePro department approvers	★					
Identify ePro project approvers	★					
Conduct Self Registration and User ID clean up						
Enjoy Memorial Day holiday	Holiday					
Identify Expense department level 1 approvers		★				
Identify Expense department level 2 approvers		★				
Identify Expense reviewers						
Identify Expense AP auditors						
Enjoy summer vacations	Employee Vacations					
Perform year-end clean up and closing tasks		Year End				
Enjoy Independence (July 4th) Day holiday			Holiday			
Finalize and release AFRs			AFRs			
Work with auditors			Audits			
Perform student registration				Registration		
Complete pre-production cutover tasks				Pre-Prod		
Attend security workshops				Security Workshops		
Complete final cutover and conversion tasks				Cutover		
Enjoy Labor Day holiday					Holiday	
Go Live					Go Live	



= Critical project tasks to complete before the Security Workshop



Milestones



May 2008

- 5/23 - Identify users to perform generic jobs
- 5/23 - Identify ePro department managers / approvers
- 5/30 - Identify ePro project managers / approvers
- 5/30 - Conduct Self Registration and User ID clean up



Milestones



June 2008

- 6/6 - Identify Expense department level 1 approvers
- 6/13 - Identify Expense department level 2 approvers
- 6/23 - Identify Expense reviewers
- 6/23 - Identify Expense project manager approvers
- 6/30 - Identify Expense AP auditors



Milestones



June 2008 to Go-Live

- Conduct Self Registration for any new employees
- Actively maintain approver spreadsheets
 - No communication with OIIT required after initial submittal



Task #1



Identify users to perform generic jobs

- Chartfield Administrator
- Workflow Administrator
- Expense Administrator
- ePro Administrator
- Expense Cash Advance Administrator

Note: Refer to project communication and GAFirst for description of roles



Task #1 (cont'd)



Identify users to perform generic jobs

- Associate users with generic jobs using Event Brite
 - See project communication for hyperlinks
- Michael Cassucio will maintain a master listing

Due May 23rd



Task #2



Identify ePro Department Managers / Approvers

- Receive Email from OIIT, attaching spreadsheet with two Tabs (completed 5/14)
 1. **Department Manager Tab** - Lists the name of the individual who is listed on the active department chart field definitions in Financials 7.5
 2. **LookUp Tab** - Lists the name, EMPLID, USERID for each active employee listed in the HRMS system in 7.5



Task #2 (cont'd)



- Update spreadsheet, using instructions on **Department Manager Tab**
- Send email back to psfin_upgrade@usg.edu attaching updated spreadsheet

Due May 23th



Instructions – Task #2



Step 0: Save the spreadsheet to your Desktop so it will be easy to find

Step 1: Enter the Business Unit and Institution Name in Cells B2 and B3

Step 2: Update the manager name in Column D, as needed

Step 3: Use the Filter icon (see Comment Box) in Column D to only display one manager at a time

Step 4: Go to the Lookup Tab and find the manager's name, EMPLID and OPRID



Instructions – Task #2



Step 5: Highlight and copy the personal data name, EMPLID and OPRID, then paste the values into Columns D, E and F on the Department Manager Tab

Step 6: Populate any blank cells in Columns D, E or F (especially the EMPLID and OPRID/USERID) ****VERY IMPORTANT**

Step 7: Repeat Steps 2 through 6 for each department / manager

Step 8: Save the spreadsheet again and return it to Ashley Young (psfin_upgrade@usg.edu) at OIIT via email on or before May 23



Sample Spreadsheet



	A	B	C	D	E	F	G	H	I	J	K
1			POPULATE THE BUS UNIT & INSTITUTION NAME			UPDATE / POPULATE INFORMATION IN THE GREEN COLUMNS ONLY					
2	Business Unit:					REQUIRED					
3	Institution Name:										
4				Response due by May 23, 2008							
5	Instructions: STEP 0: Save the spreadsheet to your Desktop so it will be easy to find STEP 1: Enter the Business Unit and Institution Name in Cells B2 and B3 STEP 2: Update the manager name in Column D, as needed STEP 3: Use the Filter icon (see Comment Box) in Column D to only display one manager at a time STEP 4: Go to the Lookup Tab and find the manager's name, emplid and oprid STEP 5: Highlight and copy the personal data name, emplid and oprid, then paste the values into Columns D, E and F on the Department Manager Tab STEP 6: Populate any blank cells in Columns D, E or F (especially the emplid and oprid/userid) ~VERY IMPORTANT STEP 7: Repeat Steps 2 through 6 for each department / manager STEP 8: Save the spreadsheet again and return it to Michael Cassuccio (michael.cassuccio@usg.edu) at OIIT via email on or before May 16			NOTE: DO NOT make any changes to Columns A, B or C. Only the information in Columns D, E and F will be used during cutover to 8.9.			Comment Box (Step 3): This is the Filter icon - click on the icon and select a manager's name from the list. Then, proceed to Step 4. HINT: To quickly search by the manager's last name Select (Custom...) *Then, select 'Contains' from the drop down list (replacing 'Equals') *Then, type the manager's last name in the adjacent box *And, click the OK push button Click the Filter icon and select (All) to re-display the entire list				
6											
7											
8											
9											
10											
11											
12											
13											
14											
15	SETID	DEPTID	DESCR	7.5 MANAGER NAME	EMPLID	USERID / OPRID					
16	76000	0000000	All Departments	Anderson, Leigh							
17	76000	0000001	Payback Project	Vaughan, Robert							
18	76000	1040000	Title III Planning Grant	Burstein, Alan							
19	76000	1101200	BSS Administration	Burstein, Alan							
20	76000	1101300	BSS	Baskin, Richard							
21	76000	1102200	Humanities - Administration	Baskin, Richard							
22	76000	1102300	Humanities	Baskin, Richard							
23	76000	1102400	Learning Support - Humanities	Baskin, Richard							
24	76000	1102500	Theatre	Baskin, Richard							
25	76000	1102600	Music	Baskin, Richard							
26	76000	1102700	Recital Series	Baskin, Richard							
27	76000	1102800	Student Success Center	Baskin, Richard							
28	76000	1103100	Darton Partnership	Baskin, Richard							
29	76000	1103200	Math/Natural Sciences - Admin.	Moore, Dewitt							
30	76000	1103300	Mathematics	Moore, Dewitt							
31	76000	1103400	Natural Sciences	Moore, Dewitt							
32	76000	1103500	Learning Support - Math	Moore, Dewitt							
33	76000	1104100	iCAPP	Cranford, Joan							
34	76000	1104200	Nursing/Health Sciences Admin.	Cranford, Joan							
35	76000	1104300	Nursing	Cranford, Joan							
36	76000	1104400	Health Sciences	Cranford, Joan							
37	76000	1105000	Instructional Faculty	Turner, Jerry							
38	76000	1106000	F-10 Computers								
39	76000	1107200	Early Childhood Educ. Admin.	Stinchcomb, Jerry							
40	76000	1107300	Early Childhood Education	Stinchcomb, Jerry							
41	76000	1108000	Off-Campus Instruction	Vaughan, Robert							
42	76000	1109000	Medical College of GA - BSN	College, Medical							
43	76000	1111111	US Dept. of Education Grant	Toon, Rhonda							
44	76000	1111112	Bridges to the Future	Stanley, Theresa							
45	76000	1111113	Operation Outreach	Williams, Nicole							
46	76000	1118000	Word Processing/Mail Services	Pharo, Jan							
47	76000	1119000	Quality Improvement	Vaughn, Robert							
48	76000	1320000	Community Education	Lowery, Patti							
49	76000	1430000	Library	Anderson, Nancy							
50	76000	1434100	Instructional Technology	Vaughan, Robert							
51	76000	1434200	GSAMS	Vaughan, Robert							
52	76000	1435000	Computer Operations - Acad.	Hayes, Jeff							

Refer to your
email attachment



Sample LookUp Tab



	A	B	C	D	E	F	G	H	I	J	K	L
1												
2	NOTE: BEFORE PRINTING, USE PRINT PREVIEW TO CHECK THE NUMBER OF PAGES TO OUTPUT - IT MAY BE 100+ PAGES											
3												
4	FOR REFERENCE PURPOSES ONLY -- DO NOT UPDATE INFORMATION ON THIS TAB											
5												
6												
7	COPY AND PASTE THIS INFORMATION INTO THE DEPARTMENT MANAGER TAB											
8	LAST_NAME	FIRST_NAME	MIDDLE_NAME	PERSONAL_DATA_NAME	EMPL	OPR	PSOPRDEFN_NAME					
9	Abbott	Hannah		Abbott,Hannah								
10	Abdul-Lateef	Fadeelah		Abdul-Lateef,Fadeelah								
11	Abdullah	Zaki	J	Abdullah,Zaki J								
12	Acheampong	Yaa	B	Acheampong,Yaa B								
13	Achille	Ricardy		Achille,Ricardy								
14	Adams	Caleb		Adams,Caleb								
15	Adams	Cynthia	A	Adams,Cynthia A								
16	Adams	Jeffery	K	Adams,Jeffery K								
17	Adams	Jeremy		Adams,Jeremy								
18	Adams	Kara	M	Adams,Kara M								
19	Adams	Marlin	C	Adams,Marlin C				Adams,Marlin C				
20	Adams	Shalanda		Adams,Shalanda								
21	Adams	Sheilagh	I	Adams,Sheilagh I								
22	Adams	Stacy		Adams,Stacy				Adams,Stacy				
23	Adams	Stacy	S	Adams,Stacy S				Adams,Stacy				
24	Adderley	Gilda	E	Adderley,Gilda E								
25	Agyekum	Frederick		Agyekum,Fredrick								
26	Agyekum	Fredrick		Agyekum,Fredrick								
27	Ajayi	Folashade	B	Ajayi,Folashade B								
28	Ajayi	Olufemi	O	Ajayi,Olufemi O								
29	Akins	Larry	L	Akins,Larry L								
30	Alcock	Antonia	L	Alcock,Antonia L								

Blocked
for
security
purposes

Refer to your
email attachment



Final Recap



May 2008

- ✓ Identify users to perform generic jobs – 5/23
- ✓ Identify ePro department managers / approvers – 5/23

**Discuss remaining
tasks and answer questions
at our next WIMBA**

**Next WIMBA
May 21st,
10:00 am**