



v8 PSFIN V8 Project
PeopleSoft Financials Version 8.9

Institutional Readiness Web Conference Call

June 21, 2007

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Agenda

- You Spoke, We Listened...
- Go-Live! Groups
- Scorecard
- IR Tasks
- Training
- Survey

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You Spoke, We Listened

You Spoke	We Listened
You requested more detail about the table structures in 8.9 to assist in your local development.	We acquired from People Soft and posted to the web Entity Relationship Diagrams (ERDs). http://www.usg.edu/gafirst/fin/project/v8/documentation/technical/
You requested detailed training task timeline.	We are presenting this to you today.

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ERD

GEORGIAFIRST

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

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V8 Project Information: Technical Documentation

[PeopleSoft 7.5 Delivered Queries](#) (Excel)

[Data Mapping](#) (Excel)

ERDs-Entity Relationship Diagrams

- [About ERDs](#)
- [AM - Asset Management](#)
- [AP - Accounts Payable](#)
- [AR - Accounts Receivable](#)
- [ePro - Procurement](#)
- [EX - Expenses](#)
- [GL - General Ledger](#)
- [PO - Purchasing](#)

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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, Budget/Prep	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 best practices	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 best practices	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 best practices
	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



IR Tasks

- June 22 – Turn in the list of active employees in your HRMS system
- Attend June IR web conference call

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Certified Trainer Kick-off

Michael Barnwell
Training Subteam lead

Jeanne Katz
Training Consultant

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Training Dates

- Names of Certified Trainers by June 15
 - Scorecard measure 4a
- Certified Trainers participate in IR call today
- Provide end user support person by July 6
 - Scorecard measure 3d

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Training Dates

- Super User per module by July 6
 - Scorecard measure 4b
- Modules
 - AM
 - AP / Expenses
 - ePro / PO
 - GL
 - Budget Prep / Commitment Control
 - AR (USO, Skidaway)

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Clarification on **NON**-traditional users

- Expenses
 - All employees who have received travel reimbursement in the past 12 months
- ePro
 - Users who will enter requisitions in 8.9

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Clarification on Training

- Scorecard item 4e – Trained Users
 - 75% of non-traditional end users from each institution participated in online learning
- Participation in online training means that users have completed UPK modules
- Participation will be tracked by Georgia View Vista

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Clarification on Training

- Scorecard item 4c
 - 33 institutions trained their end users
- Participation will be tracked by the Certified Trainer
- The Certified Trainer is responsible for the training delivery for the institution
 - This will be covered in the Training Plan

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Sample UPK Player

- <http://www.usg.edu/gafirst/fin/training/ver8/>

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User Population

- Determining Population of Traditional and Non-Traditional Users
- OIIT generates list of Expenses population July 9th Sent to Certified Trainers for validation and additional information, due to be submitted to OIIT by August 10th
- Certified Trainers will prepare list of eProcurement user population, and also a list of Traditional users, and submit by August 10th

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User Population

- Used to create the initial load of user accounts into GeorgiaView Vista, and to identify the population of Traditional and Non-Traditional users for Scorecard measures 4d and 4e.
- Your institution either determines this population, or validates it. So you can insure that you are in agreement with the content.

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Training Plan

- The Training Plan will outline the approach to scheduling, delivering, and tracking, and reporting for the institution
- You will receive Training Plan template and guidelines on July 9

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Training Plan

- Feedback and questions on the Training Plan template is due at the July 19 IR meeting.
- First draft of the Training Plan is due August 6
- Training subteam will review drafts and return to you with suggestions by August 27
- Final draft of the Training plan is due September 10

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Finalize the Training Plan

- Training subteam will review final drafts and provide recommendations at the Georgia Summit Training workshop
- The workshop will provide certified trainers with the preparation they need to coordinate the V8 training program at their institutions

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Training Materials

- Training materials for Expenses, eProcurement, and the module specific critical process that will be tested in UAT will be available by October 15

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Required Training for Certified Trainers

- Complete Effective Training Skills online course at your convenience
 - Group 1 October 15 – December 2
 - Group 2 October 15 – January 13
- Attend at least 1 super user training course
 - Group 1 December 3 – January 18
 - Group 2 January 14 – February 22

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Training Schedule Overview

- Group 1 December 3 – January 18
 - No classes planned December 24 – January 4
- Group 2 January 14 – February 22
 - No classes planned January 21 – 25
- Detailed Schedule by July 19 IR meeting

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Calendar

- Next IR Meeting
 - July 19, Thursday
- Quarterly Update Meeting
 - August 28, Tuesday
 - Includes IR meeting
 - Draft of Agenda is online – need your feedback
- Georgia Summit
 - September 19-21
 - Includes IR meeting
 - Individual Institution Interviews with Chelle Stringer

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Georgia Summit 2007

- <http://www.usg.edu/oit/summit/2007/>
- September 19-21 (workshops on the 18th)

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Georgia Summit 2007

- Workshops
 - Development / Technical (2)
 - Security / Workflow (2)
 - UPK
 - Financials

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Georgia Summit 2007

- Sessions
 - Delta-Changes in each Module
 - Commitment Control
 - Expenses
 - ePro
 - Query Overview for 8.9
 - Workflow
 - Birds of a Feather

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Need Help?

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

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