

PSFIN V8 Project Weekly Update for 05/19/2008

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For More Information:
<p>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</p>

To:	Campus Coordinator
Subject:	<i>Updated:</i> eProcurement and Expenses Workflow Presentations
Message:	<p><i>Updated:</i> An eProcurement and Expenses Workflow Presentation has been scheduled for:</p> <ul style="list-style-type: none"> • 10:00 a.m. Wednesday, May 21, 2008 <ul style="list-style-type: none"> • Note: This presentation was also given on Thursday, May 15, 2008. <p>The presentation will include the following:</p> <ul style="list-style-type: none"> • Overview of the timeline, milestones, and deliverables to configure the eProcurement and Expenses Workflow setup in preparation for the Security Workshops (see item on page for more details) • Discussion of generic roles • Discussion on how to complete the department approver spreadsheets • Question and Answer session <p>Although not mandatory, we suggest that the following personnel should plan to attend this presentation, if they have not done so already:</p> <ul style="list-style-type: none"> • Chartfield Administrators • eProcurement Administrators • Expenses Administrators • Security Administrators <p>Other interested personnel are invited to attend as well.</p> <p>The presentation will be conducted in a live web conference format using Wimba's Live Classroom. You may participate from your institution through a computer connected to the Internet. If more than one person from your institution will be participating, then we ask that you arrange to meet together in one place and only use one computer to connect to the presentation. You can also use a projector to facilitate larger groups.</p>
Action Required:	<ul style="list-style-type: none"> • Before the meeting, test the computer you will be using to be sure you can enter the Wimba Live Classroom. <ul style="list-style-type: none"> • The Horizon Wimba Setup Wizard is located at: http://208.185.32.175/wizard/launcher.cgi?wc=hmqt. • <i>Updated:</i> Participate in this meeting on Wednesday, May 21, 2008 at 10:00 a.m. <ul style="list-style-type: none"> • Go to http://gbor-oiit.wimba.com. • Click on Participant Login. • When prompted, enter the following information: <ul style="list-style-type: none"> • Room ID: PSFIN_IR (all upper case) • Name: institution_firstname (example: usg_mary)

Deadline:	As noted above
Respond To:	Michael Casuccio at psfin_upgrade@usg.edu if you have questions.
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

To:	Campus Coordinators
Subject:	Identify Key Users
Message:	<p>The following Key Users must be identified:</p> <ul style="list-style-type: none"> • Chartfield Administrator • eProcurement Administrator • Expenses Administrator • Expenses Cash Advance Administrator • Workflow Administrator <p>Documents containing the job descriptions for these Key Users are located here: http://www.usg.edu/gafirst/fin/project/v8/documentation/jobs.</p> <p>Please review the job descriptions for these roles and identify who at your institution will be responsible for these duties.</p> <ul style="list-style-type: none"> • Note: You may have more than one user assigned to a job description (e.g., two individuals may perform your Expenses Administrator job duties). If you have more than one individual per job description, please indicate who is the primary and who is the secondary.
Action Required:	<p>Use the links listed below to register the contact information for each key user:</p> <ul style="list-style-type: none"> • Chartfield Administrator: http://v8-chartfield-admin.eventbrite.com/. • eProcurement Administrator: http://v8-epro-admin.eventbrite.com/. • Expenses Administrator: http://v8-exp-admin.eventbrite.com/. • Expenses Cash Advance Administrator: http://v8-exp-cashadv.eventbrite.com/. • Workflow Administrator: http://v8-wf-admin.eventbrite.com/. • NOTE: The event password is: V8.
Deadline:	Close of Business This Friday, May 23, 2008
Respond To:	<ul style="list-style-type: none"> • Links listed above to register the contact information for each key user. • Ashley Young at psfin_upgrade@usg.edu if you have any questions.
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

To:	Campus Coordinators
Subject:	<i>Updated:</i> Identify eProcurement Department Manager IDs
Message:	<p>eProcurement workflow approval routing in 8.9 requires a Manager ID on the DEPARTMENT ChartField record. The Manager ID is based on the User ID or Employee Identification Number. This was not a requirement in 7.5.</p> <p>Each institution needs to identify the individual who is responsible for updating this information for each department. Typically, since the Accounting Chartfields are owned by the Finance and Accounting area, someone from that area will need to be responsible for this task.</p> <p><i>Updated:</i> A spreadsheet has been mailed to Campus Coordinators to provide assistance in identifying the appropriate User data to be updated into the appropriate chartfield record. Step-by-step instructions are included in the spreadsheet. You will use these spreadsheets to manually load these data into your institution's upgraded 8.9 database during the preproduction cutover.</p> <ul style="list-style-type: none"> • Note: There will be a demonstration at the eProcurement and Expenses Workflow Presentation, noted on page 2, on how to fill in the spreadsheet. <p>Note 1: If the Manager ID on these records is missing or incorrect, the workflow approval(s) routings will not be functional at Go Live! Everything will be routed to the eProcurement Administrator instead. This may result in unnecessary delay in approvals.</p> <p>Note 2: UPK #EP.010.070 and EP.010.080 has been developed for the on-going maintenance of the DEPARTMENT and PROJECT chartfields, respectively.</p>
Action Required:	Follow the directions in the spreadsheet to provide the required information to complete all Manager ID fields in the Chartfield values for DEPARTMENT.
Deadline:	Close of Business This Friday, May 23, 2008
Respond To:	Michael Casuccio at psfin_upgrade@usg.edu if you have questions.
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

To:	Campus Coordinators
Subject:	Active Employees, Core Financials Users, and Self Registration in HRMS
Message:	<p>The Implementation of Expenses and eProcurement in version 8.9 will cause the number of users in the Financials application to grow significantly. In conjunction with this implementation, we will also implement Single Sign On between the HRMS Self Service Portal and the Financials Self Service Portal. Single Sign On will allow users to log into Self Service one time and have seamless access to both their personal HR and Finance information, such as Personal, Job, Payroll, Benefits, and Expense Reimbursements.</p> <p>With this change, PeopleSoft HRMS will become the System of Record for User IDs, E-mail addresses, and passwords. In order to synchronize User IDs and access between PeopleSoft Financials and HRMS, active employees who have not already done so must create a Self Service User ID via the Self Registration process in PeopleSoft HRMS. Users must also set up a primary email address in HRMS that will be synchronized to PeopleSoft Financials, and used for workflow notifications.</p> <p><u>If you are:</u></p> <ol style="list-style-type: none"> 1. An existing Core FIN user and you HAVE registered for HR Self Service using your Core FIN UserID, no action is required. 2. An existing Core FIN user and HAVE NOT registered for HR Self Service, you must register using your current FIN UserID. 3. An existing Core FIN user and you HAVE registered for HR Self Service but used a UserID that is different than your FIN UserID, you must: <ul style="list-style-type: none"> • Contact your security administrator and have them delete your HR Self Service UserID. • Then log in to HRMS Self Service and complete the registration process again, using the same UserID as your FIN UserID. 4. Both a Core FIN user and a Core HRMS user, you have two choices: <ol style="list-style-type: none"> a. You can do nothing and your HR User ID will be synced to the Finance database for Single Sign On. Thus, you will have one User ID for Self Service and Core HR, and one User ID for Core Financials. (or) b. You can choose to have your security admin delete one of your User IDs and rebuild it using your primary UserID. The new account would have the same roles as the previous account.

	<p>Note 1: If you are an existing Core user in both HR and FIN, your User ID in each system may also be tied to Run Controls, Private Queries, Process Scheduler Reports, Process Monitor Jobs, or other unique system processes. Please consider this information if you decide to delete and recreate one of your Core User IDs. The deleted User ID will lose all access to the above-mentioned historical transactions.</p> <p>Note 2: If you are an existing Core FIN user and your User ID is less than six (6) characters, the HRMS Self Registration process will not work. You must have your HRMS Security Administrator add the User ID in HRMS with the Base PeopleSoft User role only.</p>
Action Required:	<p>Require all active employees to register for Self Service and enter a primary E-mail account.</p> <p>Note: Since PeopleSoft HRMS will become the central store for passwords, the password that is in HRMS Self Service at the time of cutover will become the password for the Financials application as well. Passwords from that time forward will be synchronized between both systems. It will be important for users to remember or change their password in HRMS Self Service prior to Go-Live.</p>
Deadline:	<ul style="list-style-type: none"> • All active employees must be registered by 5:00 p.m. on Friday, May 30, 2008. • All new employees should be registered monthly thereafter, with registration of all employees completed by Tuesday, August 1, 2008.
Respond To:	Shelia Sloan at psfin_upgrade@usg.edu if you have any questions.
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

To:	Certified Trainers
Subject:	List of Traditional End Users with E-mail Addresses
Message:	<p>In support of Item 4d on the Project Success Scorecard, please provide a list of the traditional end users (<u>not Super Users</u>) who would use the following modules:</p> <ul style="list-style-type: none"> • Accounts Payable • Accounts Receivable (USO and Skidaway only) • Asset Management • Budget Prep • Commitment Control • eProcurement (Buyers and Managers only) • General Ledger • Purchasing <p>Please include the following information for each user:</p> <ul style="list-style-type: none"> • First Name • Last Name • E-mail Address <p>We do not need the users grouped by module. Please provide <u>one list</u> for all users of all the listed modules. <u>Please do not include duplicate names.</u> This information will be used to create the GeorgiaVIEW Vista accounts needed for training all traditional end users.</p> <p>Note: Please do not include those attending Super User Training. Expenses users are not needed, because they are either Non-Traditional Users or Super Users.</p>
Action Required:	Prepare and send list as text file, such as a Notepad file.
Deadline:	Friday June 6, 2008
Respond To:	Michael Barnwell at psfin_upgrade@usg.edu with the requested information or if you have a question
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

To:	Campus Coordinators and Certified Trainers
Subject:	Update Training Plans
Message:	<p>It's time to dust off your Training Plans and update the parts that could not be specified previously, specifically, the dates and times of any instructor-led sessions or workshops.</p> <ul style="list-style-type: none"> • Note: For Expenses Self-Service users, known as "Travelers" in Travel and Expenses terms, we recommend that you plan to use the UPK Player as your primary delivery method, but that you also schedule at least two workshops for these users to attend, so they can receive hands-on assistance if they wish. <p>You should also review your complete plan to make any other changes or updates as needed.</p>
Action Required:	<ul style="list-style-type: none"> • Update Training Plans to include dates and times of any instructor-led sessions or workshops, and update other sections as needed. • Send copies of the updated Training Plans to OIIT.
Deadline:	Friday, June 20, 2008
Respond To:	Michael Barnwell at psfin_upgrade@usg.edu with copies of the updated Training Plans, or if you have questions.
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

To:	Campus Coordinators
Subject:	<i>Updated:</i> PSFIN V8 Project June Quarterly Update Meeting
Message:	<p>The next Quarterly Update Meeting has been scheduled for:</p> <ul style="list-style-type: none"> • Date: Wednesday, June 18, 2008 • Time: 10:00 a.m. – 1:00 p.m. • Location: Macon State College, Auditorium K <p>The June Institutional Readiness Web Conference will be conducted at this Quarterly Update Meeting. All Campus Coordinators are required to attend the Quarterly Update Meeting and the Institutional Readiness Web Conference.</p> <p><i>Updated:</i> This meeting is shorter than previous Quarterly Update Meetings in order to minimize the time that attendees would have to be away from their offices, and to allow attendees to do their traveling all in the same day rather than having to drive in the day before and spend the night.</p>
Action Required:	<ul style="list-style-type: none"> • Campus Coordinators should submit the names of the representatives from your institution who will be attending this meeting by Monday, June 2, 2008. • Register for this meeting online at: http://junequm.eventbrite.com. Campus Coordinators should go to this link and enter the requested information for each attendee from your institution. Up to four (4) attendees can attend from each institution. <ul style="list-style-type: none"> • NOTE: The event password is: V8. • Reserve Wednesday, June 18, 2008 from 10:00 a.m. to 1:00 p.m., for this Quarterly Update Meeting.
Deadline:	As noted above
Respond To:	Michael Casuccio at 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

To:	Certified Trainers
Subject:	Certified Trainer Webinar
Message:	<p>A Certified Trainer webinar has been scheduled for:</p> <ul style="list-style-type: none"> • 10:00 a.m. Monday, June 30, 2008 <p>All Certified Trainers should plan to attend or designate an alternate to attend in your place.</p> <p>This meeting will be conducted in a live web conference format using Wimba's Live Classroom. You may participate from your institution through a computer connected to the Internet. If more than one person from your institution will be participating, then we ask that you arrange to meet together in one place and only use one computer to connect to the meeting. You can also use a projector to facilitate larger groups.</p>
Action Required:	<ul style="list-style-type: none"> • Before the meeting, test the computer you will be using to be sure you can enter the Wimba Live Classroom. <ul style="list-style-type: none"> • The Horizon Wimba Setup Wizard is located at: http://208.185.32.175/wizard/launcher.cgi?wc=hmqt. • Participate in this meeting Monday, June 30, 2008 at 10:00 a.m. <ul style="list-style-type: none"> • Go to http://gbor-oiit.wimba.com. • Click on Participant Login. • When prompted, enter the following information: <ul style="list-style-type: none"> • Room ID: PSFIN_IR (all upper case) • Name: institution_firstname (example: usg_mary)
Deadline:	As noted above
Respond To:	Michael Barnwell at psfin_upgrade@usg.edu if you have questions.
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

To:	Campus Coordinators, Technical Representatives, and Certified Trainers
Subject:	PSFIN V8 Project Institutional Readiness Web Conferences
Message:	<p>The next monthly Institutional Readiness Web Conferences have been scheduled for 10:00 a.m. on the following dates:</p> <ul style="list-style-type: none"> • Groups 1 and 2: Wednesday 16, July, 2008 • Group 1: Tuesday, August 26, 2008 • Group 2: Wednesday, September 24, 2008 <p>Participation in these monthly meetings is vital to the success of the V8 Project and is therefore mandatory. All Campus Coordinators should plan to attend or designate an alternate to attend in your place. At least one representative from each institution should participate in these monthly meetings.</p> <p>These meetings will be conducted in a live web conference format using Wimba's Live Classroom. You may participate from your institution through a computer connected to the Internet. If more than one person from your institution will be participating, then we ask that you arrange to meet together in one place and only use one computer to connect to the meeting. You can also use a projector to facilitate larger groups.</p>
Action Required:	<ul style="list-style-type: none"> • Before the meeting, test the computer you will be using to be sure you can enter the Wimba Live Classroom. <ul style="list-style-type: none"> • The Horizon Wimba Setup Wizard is located at: http://208.185.32.175/wizard/launcher.cgi?wc=hmqt. • Participate in these meetings as noted above. <ul style="list-style-type: none"> • Go to http://gbor-oiit.wimba.com. • Click on Participant Login. • When prompted, enter the following information: <ul style="list-style-type: none"> • Room ID: PSFIN_IR (all upper case) • Name: institution_firstname (example: usg_mary) • Go to the PSFIN V8 project website to view documents related to these and previous IR Web Conferences. • More information and detailed instructions are located at: http://www.usg.edu/gafirst/fin/project/v8/news/events.
Deadline:	As noted above
Respond To:	psfin_upgrade@usg.edu if you have questions.
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

To:	Campus Coordinators and Certified Trainers
Subject:	Super User Training – Open Registration Available
Message:	<p>Open Super User Training registration is now available starting today Monday, May 5, 2008 through the following dates:</p> <ul style="list-style-type: none"> • Registration for available Group 1 sessions will end on: Wednesday, July 23, 2008 • Registration for available Group 2 sessions will end on: Wednesday, August 20, 2008 <p>Open registration means that anyone in either group may register for any course, based on availability. Each group has priority for courses in their group.</p> <p>The Super User Training course schedule has been posted to the PSFIN web site, and can be seen at the following URL: http://www.usg.edu/gafirst/fin/training/ver8/training_events/schedule.pdf.</p>
Action Required:	Register Super Users for Super User Training by clicking on the links in the document referenced above.
Deadline:	As noted above
Respond To:	Michael Barnwell at psfin_upgrade@usg.edu if you have questions.
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

To:	Campus Coordinators and Security Administrators
Subject:	<i>Updated:</i> PSFIN V8 Security Workshops – Registration Open
Message:	<p>Your V8 Security Administrator will be responsible for creating user security profiles for your V8 Financials environment before you Go-Live. In order to assist you with this task, the PSFIN V8 Project team is conducting two one-day Security Workshops in a lab environment.</p> <ul style="list-style-type: none"> • What: Security Workshops • When: 8:30 a.m. – 4:30 p.m. <ul style="list-style-type: none"> • Group 1: August 6, 2008 • Group 2: September 10, 2008 • Where: OIIT, Athens • Who: V8 Security Administrators <p>We will be covering the changes to security, and then we will work with your Security Administrator to establish V8 security profiles for your core PeopleSoft Financials users. These security profiles will be set up in your institution's Pre-Production database and will be migrated to your Production database at Go-Live.</p> <p>Your Security Administrators will need to prepare a Security Request Form for each of your existing core users in the Financials 7.5 system. These forms will document each user's access in the system, as well as each user's job roles that will be used to build V8 role assignments in your Pre-Production database.</p> <ul style="list-style-type: none"> • Note: A revised Security Request Form will be posted to the PSFIN V8 website on or about June 1st at: http://www.usg.edu/gafirst/fin/project/v8/documentation/technical/. Also, all business processes will be updated with the correct security role. <p>The forms will be used during the workshop to build each core user with required role assignments. After the workshops, OIIT will extract your user security profiles from the Pre-Production environment and migrate it to your Production 8.9 environment.</p>
Action Required:	<ul style="list-style-type: none"> • Task 1: Register for a Security Workshop online at: <ul style="list-style-type: none"> • Group 1: http://securitygrp1.eventbrite.com/ • Group 2: http://securitygrp2.eventbrite.com/ <ul style="list-style-type: none"> • NOTE: The event password is: V8 • Updated: Your Security Administrator should go to the appropriate link and enter the requested information for two attendees from your institution. • Task 2: Prepare a Security Request Form for each existing core user in

	<p>your Financials 7.5 system and bring it with you to the workshop.</p> <ul style="list-style-type: none">• Task 3: Build each user in the Pre-Production environment and create all user security profiles before Go-Live.
Deadlines:	<ul style="list-style-type: none">• Task 1: Sunday, June 1, 2008, no later than 5:00 p.m.• Task 2: Completed by date of your scheduled workshop.• Task 3: Completed during your scheduled workshop.
Respond To:	Shelia Sloan at psfin_upgrade@usg.edu if you have any questions.
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