

# Georgia *FIRST* Year in Review and Roadmap Update

Donna Wooddell

Paige Born

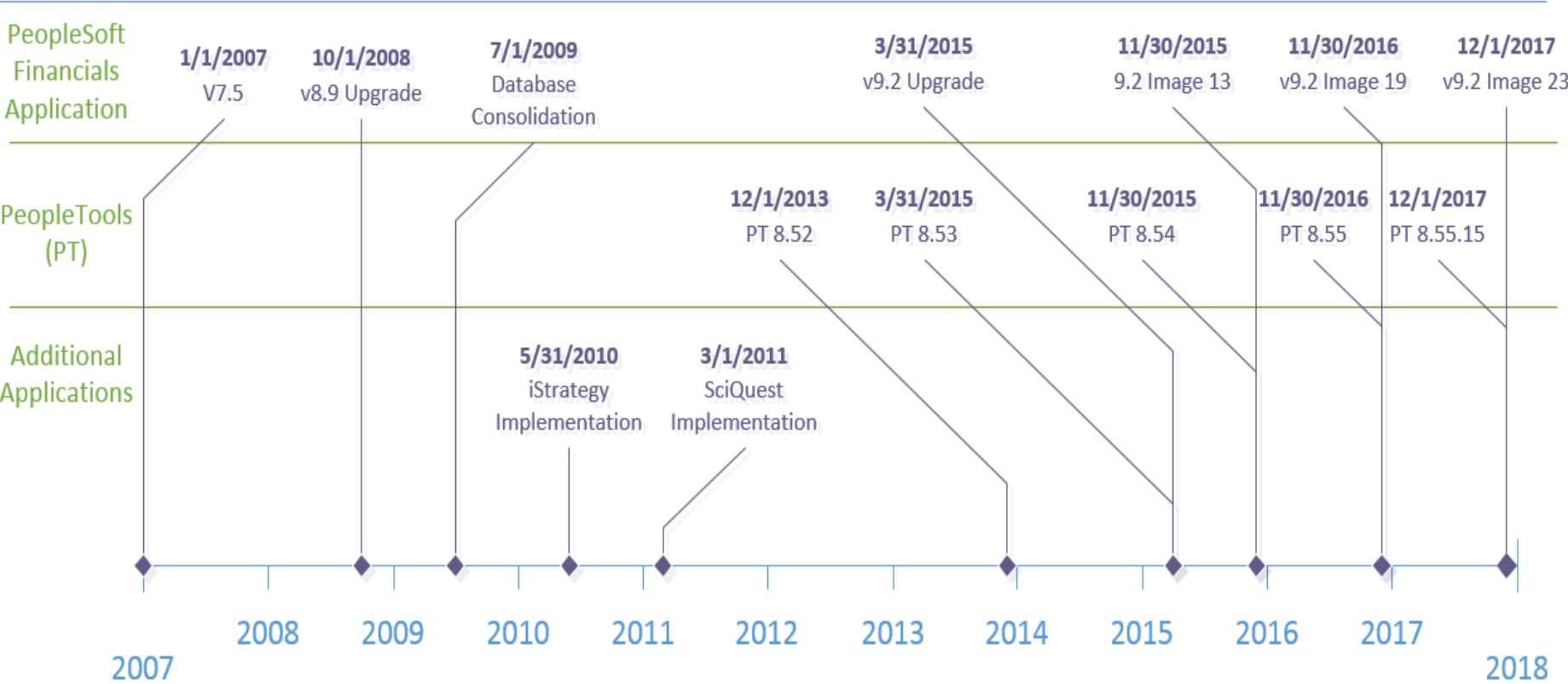


# Agenda

Note: Session Time adjustment: 5:10pm-5:50pm

- Financials Application Timeline
- Georgia*FIRST* by the Numbers
- Releases
- 2017 Annual Oracle Maintenance Release
- Update on Module Review Sessions
- Other Projects and Initiatives

# Financials Application Timeline

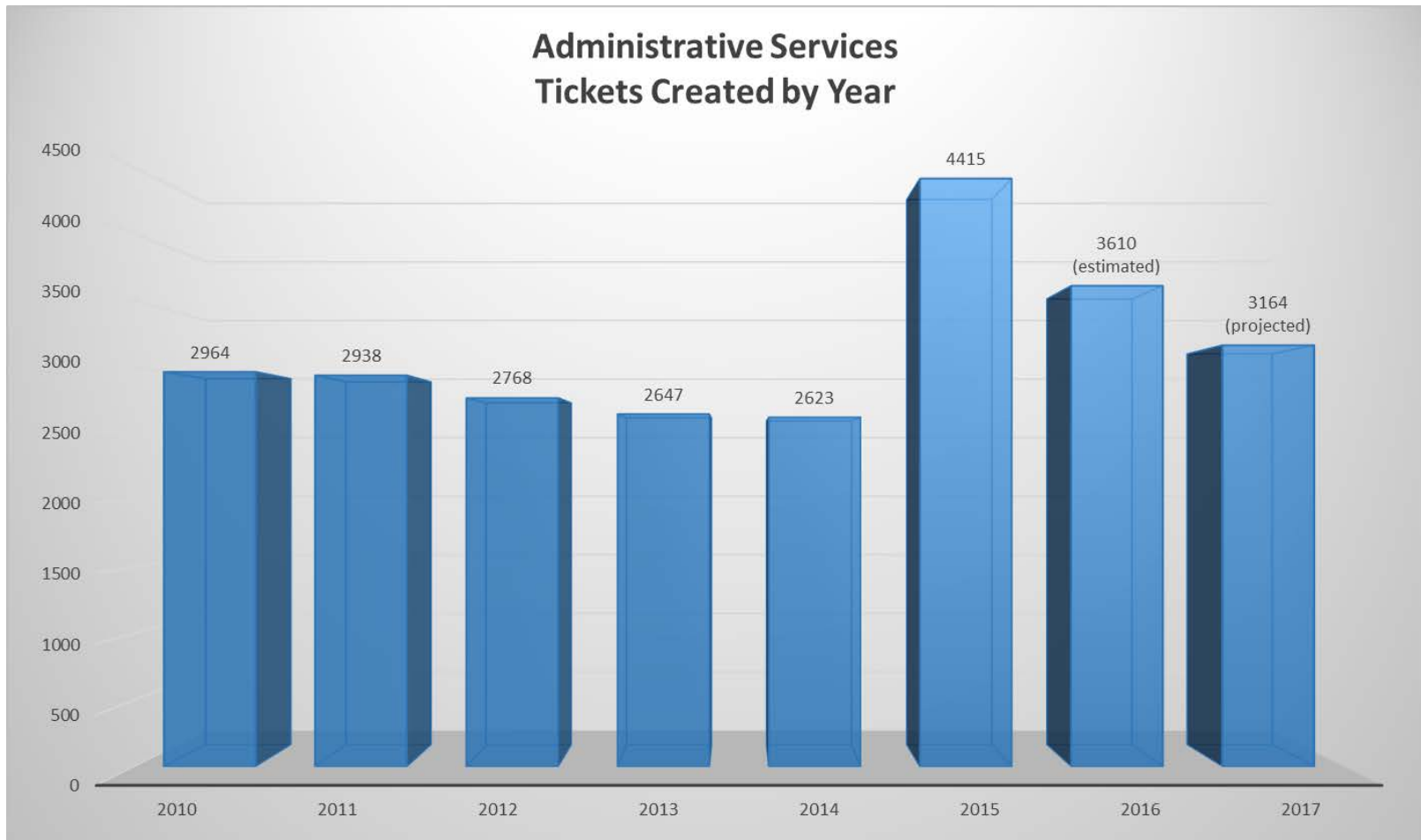


# Georgia *FIRST* by the Numbers

- Hosts **25** institutions in the consolidated PeopleSoft Financials environment
  - Five of these are consolidated institutions
- Supports **10** financial modules:
  - GL, Commitment Control, AR, ePro, PO, AP, AM, T&E, Budget Prep, Common Remitter
- During 2016, supported approximately **11,469** active users in PeopleSoft Financials

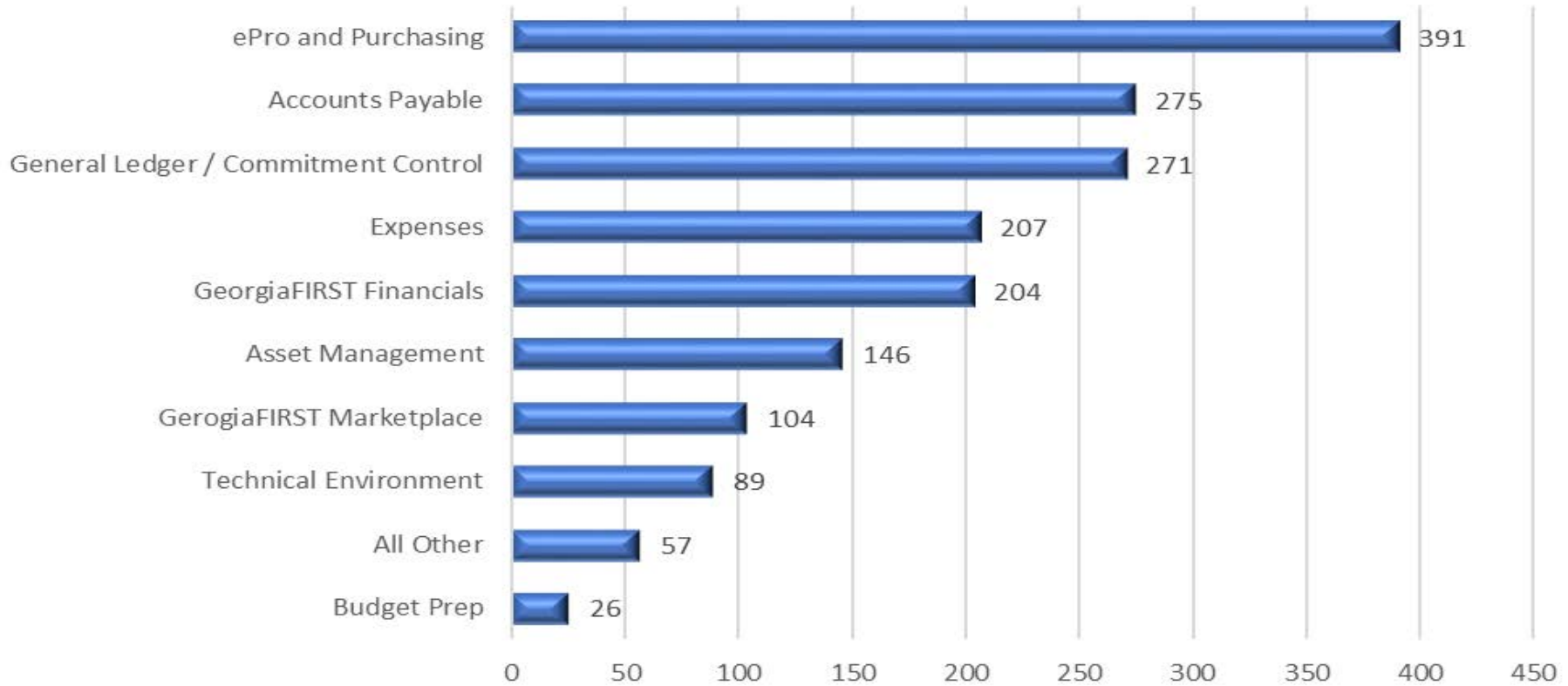


# Georgia*FIRST* by the Numbers



# GeorgiaFIRST by the Numbers

## Tickets Opened February 1 - September 26, 2017



# One Team, One Mission Sharpen Your Game



# Financials Involvement - OneUSG Connect Project

- Georgia *FIRST* Financials support provided to OneUSG Connect project:
  - Functional resources:
    - Dedicated three resources at 75%+
  - Technical Resources:
    - Dedicated three resources at 75%+
- Resource forecasting:
  - Redirect resources back to Financials starting April, 2018



# Financials Involvement - OneUSG Connect Project

- Impact to Financials Roadmap:
  - Rolling out of new Oracle functionality
  - Ability to develop project plan for implementing new modules
  - Ability to research and identify reporting solution
- Things not impacted:
  - Production Support
  - Consolidation Projects

# RELEASES



# Maintenance Strategy

- Oracle's PeopleSoft Selective Adoption
  - Update as opposed to Upgrade
- Application
  - Maintenance including bug fixes and regulatory updates
  - New features and enhancements
- Infrastructure and PeopleTools
  - Servers, databases, developer tools, security and query
- PeopleSoft Update Manager (PUM)
  - PeopleSoft Update Image (PI)



# 2017 Annual Maintenance Release

- A testing project, not a technical project.
  - More than 3,000 system test scenarios to validate
- 2017 Scope:
  - Through PI 23
  - PeopleTools 8.55.17
- Apply, Evaluate, Retrofit
  - 60 retrofits included in 2017 Annual Maintenance Release



# User Experience

- Single Sign-On
  - Currently available for OneUSG Connect and OneUSG Connect Benefits.
- Two-factor authentication
- Strategy for Georgia*FIRST*



# User Experience

- PeopleSoft Fluid User Interface
  - Modern UI for all devices including tablets, smartphones and desktop.
  - Initial scope: Self-Service functionality.
- Fluid Homepage and Header
  - Tiles
  - Search - Elasticsearch
  - Notifications
  - Hamburger
  - NavBar




# New Fluid Homepage

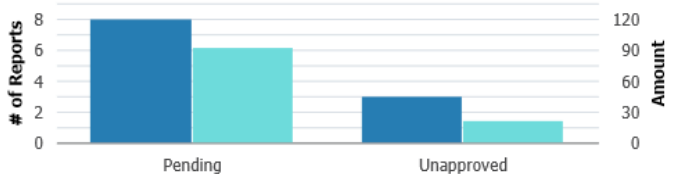
Employee Self Service

Home Search Menu

### Create Expense Report




### My Expense Reports




Category	# of Reports	Amount
Pending	8	120
Unapproved	2	30

11 Active Expense Reports


### Travel Authorizations



### Cash Advances




### Expense Report History




### My Travel Authorizations



### GeorgiaFirst Financial Website



### GeorgiaFirst MarketPlace





# 2017 Annual Maintenance Release

- URL change:
  - Practitioner: [core.fprod.gafirst.usg.edu](http://core.fprod.gafirst.usg.edu)
  - Self Service: [selfservice.fprod.gafirst.usg.edu](http://selfservice.fprod.gafirst.usg.edu)





# 2017 Annual Maintenance Release

- New Department Manager Dashboard
  - Real time results rather than previous days data
  - Department-level security
  - Geared to non-traditional users
  - Drill down capability

*To learn more, attend session “Department Manager Dashboard” tomorrow @ 1:40pm*



# 2017 Annual Maintenance Release

- New Department Manager Dashboard

Employee Self Service Department Manager Expenses

98000

Budget Reference: 2017

[Clear All](#)

**Pivot Grid** - Collapse All

*Press hold icon and drag and drop to column or row below. [Need help?](#)*

Column	Values
Row	Account

	Total Budget Amount (Sum)	Pre Encumbered Amount (Sum)	Encumbered Amount (Sum)	Expense Amount (Sum)	Remaining Budget (Sum)
- All	2715941257.640	589.170	19765507.600	2655020580.770	41154580.100
600000	1181934.030	0.000	0.000	1131770.130	50163.900
700000	2714759323.610	589.170	19765507.600	2653888810.640	41104416.200

**Account**

- 700000 (215)
- 500000 (85)
- 600000 (77)
- 727000 (45)

[More](#)

**Fund**

- 10000 (101)

# 2017 Annual Maintenance Release

- Implementing Supplier Workflow
  - Suppliers will need to be in an Approved (or Inactive) status prior to Release 5.30.
  - ITS will provide list to institutions in November.

*For more information, attend “ePro & Purchasing Upcoming Enhancements” session Thursday @ 11:30am*



# 2017 Annual Maintenance Release

- Timing of Annual Release:
  - Scheduled to apply Friday, December 1 to Sunday, December 3.
  - PeopleSoft Financials production database will be available for use 7:00am Monday, December 4.



# 2017 Annual Maintenance Release

- How to prepare:
  - Communicate system downtime
  - Change Management:
    - Prepare users for UI changes
      - ITS will provide a short YouTube video
    - Provide new URL
    - Download new Journal & Voucher spreadsheets
  - Plan for new features
    - Supplier Workflow setup
    - Department Manager Dashboard
    - Security Administration



# 2017 Annual Maintenance Release

- How to prepare:
  - Data Best Practice Recommendations:
    - Suppliers
      - Need to be in **Approved** or **Inactive** status
    - Workflow Approvals
      - Transactions should be in **Pending** or **Approved** status
      - Includes Travel Authorizations, Expense Reports, AP Vouchers, Journals, Requisitions, Purchase Orders



# UPDATE ON MODULE ENHANCEMENT REVIEW SESSIONS



# Enhancements – Module Reviews

- Purpose of Module Enhancement Reviews
  - Review Oracle image fixes and new features.
  - Sessions allow sharing with institution process experts to obtain customer feedback and priority for implementing.
  - Depending on the implementation complexity (High, Medium, Low), USO Leader Team and/or USG Advisory Team approval required.





# Enhancements – Module Reviews

- Outcome of Module Enhancement Reviews:
  - Institutions vote on their top three enhancement priorities
  - This provides user input so ITS is focused on highest priority needs of institutions.
  - The outcome is a roadmap for delivery of new enhancements.



# Enhancements – Module Reviews

- MER Sessions completed:
  - ePro and Purchasing: April, 2016
  - Asset Management: November, 2016
  - Accounts Payable: November, 2016
  - Expense module: March, 2017



# Enhancements – Module Reviews

- **Priorities for ePro & Purchasing:**
  1. Procurement Contracts/Contract & Sourcing Workbench
  2. Supplier 360
  3. Electronic Signature on Purchase Order



# Enhancements – Module Reviews

- Status of Priorities for ePro & Purchasing:
  1. Procurement Contracts/Contract & Sourcing Workbench – In Progress
    - Meetings conducted with USO & DOAS representatives.
  2. Supplier 360 - On hold
    - Oracle issue has prevented delivery
  3. Electronic Signature on Purchase Order – In Progress
    - Development has started – deliver in 2018



# Enhancements – Module Reviews

- **Priorities for Asset Management:**
  1. Transaction Reversal
  2. Physical Inventory
  3. Documentation and Training



# Enhancements – Module Reviews

- Status of Priorities for Asset Management:
  1. Transaction Reversal - **Complete**
    - Implemented May 2017
  2. Physical Inventory – On hold
    - Due to change in AM support staff and other priorities
  3. Documentation and Training - Ongoing
    - Updated all AM Business Processes
    - New BP for Transaction Reversal
    - Monthly Checklist



# Enhancements – Module Reviews

- **Priorities for Accounts Payable:**
  1. Documentation and Training
  2. Voucher Batch Approval (submit for approval)
  3. Payment Requests



# Enhancements – Module Reviews

- Status of Priorities for Accounts Payable:
  1. Documentation and Training - Ongoing
    - AP Query training, etc.
  2. Voucher Batch Approval (submit for approval) - **Complete**
    - Implemented April 2017
  3. Payment Requests – In Progress
    - Tentatively planning to deliver Spring 2018





# Enhancements – Module Reviews

< Payment Request Center
Payment Request Center

Payment Request Center
Welcome: J.Beitzel OIIT

**Request Summary** From 06/27/2017 to 09/25/2017

Display	Status	Number of Requests
<input checked="" type="checkbox"/>	Pending	2
<input checked="" type="checkbox"/>	Approved	1
<input type="checkbox"/>	Vouchered	1

**Recent Messages**

Request ID	Message Topic	Last Updated By	Last Updated Datetime	Initiated By	Initial Datetime
0000000003	CAT supplier - non PO voucher	Janice Brown	09/21/2017 4:59PM	Janice Brown	09/21/2017 4:58PM

Create

**Requests**

Request ID	Entered Datetime	Invoice Number	Supplier ID	Supplier	Description	Total Amount	Currency	Request Status	Business Unit	Voucher ID	Scheduled to Pay	
0000000004	09/25/2017 10:41AM	258258	0000007426	PaperClip Communications	Test Request	100.00	USD	Approved	98000			
0000000003	09/21/2017 4:51PM	TEST3JB	CAT0000010	Staples	TEST	1,000.00	USD	Pending	98000			
0000000002	09/21/2017 4:38PM	TEST2JB	0000000152	Canon U. S. A. Inc	TESST	200.00	USD	Pending	98000			



# Enhancements – Module Reviews

- Additional Enhancements for Accounts Payable:
  4. Audit Logging - **Complete**
    - Provides a Financial audit trail that captures User ID and date/time of individual performing action.
    - Turned on for Payment Cancellations 4/24/2017.
    - Currently, only ITS Support has access to the audit logs. Users can request this information.
    - ITS will be looking at turning this on for other modules (Journals, Assets, etc.).



# Enhancements – Module Reviews

- Priorities for Travel & Expenses module:
  1. Risk Templates
  2. Training and Documentation
  3. Attachment capability for Approvers



# Enhancements – Module Reviews

- Status of Priorities for Travel & Expenses:
  1. Risk Templates – In Progress
    - Explore using for Expense Reports approaching 60 day threshold. Plan to prototype and test later this year.
  2. Training and Documentation - Ongoing
    - New T&E Query & Report Job Aid
    - Job aids around Expense Report creation & submission
  3. Attachment capability for Approvers - **Complete**
    - Configuration change made in production 05/22/2017



# Enhancements – Module Reviews

- Additional Enhancements for Travel & Expenses:
  4. Configuration Cleanup for Expense Types – **Complete**
    - During MER session, existing values were reviewed and users provided input on changes needed.
    - This cleanup will make for a more user friendly experience and includes items like:
      - Removal of required fields that are no longer necessary.
      - Improved Expense Type Descriptions
    - Changes made in production 5/22/2017.



# OTHER PROJECTS & INITIATIVES



# Institutional Consolidations

- July 1, 2017:
  - Albany State University and Darton State College = new Albany State University
- July 1, 2018:
  - Georgia Southern University + Armstrong State University = New Georgia Southern University
  - ABAC + Bainbridge College = New ABAC



# Budget Prep Redesign

- Required due to implementation of OneUSG Connect.
- Will be used by all Georgia *FIRST* institutions for FY2019 Budget development.
- Will include additional enhancements proposed by Budget users in Design Session March, 2016.
- System testing in progress.
- User Acceptance Testing will be scheduled later this year.

*For more information, attend Christy Todd's session  
"Budget Prep Redesign" tomorrow at 8:30am*





# Budget Amendment Functionality

- New Budget Amendment Functionality:
  - Plan to begin development following Budget Prep redesign system and user acceptance testing.
  - Goal is to deliver for institutional use beginning July 1, 2018 for FY2019 budgets.
  - Our first priority is support of OneUSG so this will be dependent on functional and technical resource availability.



# OneUSG Connect & Financials Integration

- Financials Integration
  - Significant changes in how data syncs to Financials.
  - Personal data no longer nightly feed, feeds over throughout the day.
- Common Remitter and Benefits Recon
  - Changing January 2018 for Cohort 1 & 2 institutions
    - Access through OneUSG Connect
  - Will remain in Financials for institutions in cohort 3 until go-live.
- OneUSG “Blackout” dates for Cohort 1 institutions
  - In December (*schedule still being finalized*)
  - We will need to evaluate impact to personal data changes, etc.



# Financials Business Intelligence Solution

- Started exploring potential solutions in 2015.
- One step forward with new Department Manager dashboard.
  - Modeled after Georgia State solution
- Oracle continues to deliver new reporting solutions.
- Roadmap for determining a solution 2018/2019.

*Attend the “Oracle Financial Analytics” session  
Friday @ 9:30am*



# Grants Suite

- Implementation of Grants Suite
  - Includes five new modules:
    - Project Costing, Billing, AR, Contracts and Grants
  - Project planning will begin once resources available and approved/prioritized by USO Leader Team.

## *Attend related sessions:*

- *PSFT Grants – Management and Grow Your Portfolio (Thursday @ 2:40pm)*
- *General Ledger Upcoming Enhancements (Friday @ 8:30am)*



# ePro/GFM Implementation Update

- eProcurement & Georgia *FIRST* Marketplace (GFM)
  - 21 Institutions are using ePro
  - 18 of these also use GFM
    - 2 - institutions went live on GFM this year
    - 2 - in process of implementing GFM



# Travel & Expense Implementation Update

- PeopleSoft Travel & Expense Module
  - Currently 17 Georgia *FIRST* institutions are using T&E
  - Continued emphasis on improving user experience
    - July 2016 - Configuration change made to turn off budget check for Travel Authorizations (hanging encumbrance issues)
    - December 2016 - Daily one line Meal Per Diem added to streamline meal entry
    - May/June 2017 - Additional improvements identified in module review sessions
    - December 2017 – Fluid User Interface (mobile)



# Questions

