

PSFIN V8 Project Weekly Update for 12/10/2007

Tasks & Announcements		
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02/01-15/08	PSFIN V8 Security Workshops	11

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 Coordinators and Technical Representatives
Subject:	Follow Up to the December 2007 Quarterly Update Meeting and Institutional Readiness Meeting
Message:	<p>There was 100% representation from all of the Georgia<i>FIRST</i> institutions, with 100 people attending these meetings.</p> <p>The updated slides for these meetings are available on the Georgia<i>FIRST</i> Financials website at: http://www.usg.edu/gafirst/fin/project/v8/news/events.</p> <p>Other documents referenced at the meetings are now available at the web links shown in the slides.</p>
Action Required:	None
Deadline:	None
Respond To:	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
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To:	Campus Coordinators
Subject:	Banner Integration Tasks for User Acceptance Testing (UAT)
Message:	<p>Each institution whose Banner databases are not hosted by OIIT must prepare a Banner test environment that is at the same version as Banner production. You must submit the necessary information for us to create the database link from PSFIN to the Banner clone (BNRLINK). You will also need to have your Banner DBA create and test the link from Banner to the Financials clone used for UAT (PSFIN link).</p>
Action Required:	<p>Task 1. Prepare Banner environment and submit link information</p> <p>Your Banner DBA must prepare a Banner test environment and submit the following information to OIIT so our DBAs can create the link from PSFIN to Banner (BNRLINK):</p> <ol style="list-style-type: none"> 1. IP Address of the machine with the test environment being used 2. Hostname of the machine 3. SID of testing database 4. Listener Port 5. BANQUEST password to set up the link to Banner <p>Updated: You may send an email with the above information except for the BANQUEST password. To submit your BANQUEST password, your Banner DBA must call the OIIT HELPDESK, refer to Change Request #13802, and ask for Rodney Latimer, the PSFIN DBA. If he is not available at the time of your call, please leave a voice mail with the information.</p> <p>Updated: Task 2. Create a firewall rule to allow traffic from OIIT to your Banner server</p> <p>Your Networking staff will need to create a firewall rule that will allow traffic from OIIT to your Banner clone. OIIT will contact you by December 7th with the information your technical staff will need to create the firewall rule.</p> <p>Task 3. Create and test the PSFIN link</p> <p>Updated: Your Banner DBA should create the PSFIN link and test the link to ensure it is functioning properly. This should be done during the following dates:</p> <ul style="list-style-type: none"> • Database available to begin testing: January 2, 2008 (Groups 1 and 2) • Deadline to complete testing: January 11, 2008 (Groups 1 and 2)

Deadlines:	Updated: <ul style="list-style-type: none">• Task 1: Friday, January 4, 2008 for Groups 1 and 2• Task 2: Friday, January 4, 2008 for Groups 1 and 2• Task 3: Wednesday, January 2, 2008 through Tuesday, January 11, 2008 for Groups 1 and 2
Respond To:	<ul style="list-style-type: none">• psfin_upgrade@usg.edu with the requested information or if you have any questions.• The OIT HELPDESK at 706-583-2001; or toll free within Georgia 1-888-875-3697 to contact Rodney Latimer.
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:	Closed Super User Training Registration Available
Message:	<p>Closed Super User Training registration is now available. Closed registration means that you can register only for courses for your group (Group 1 or Group 2). After January 11th, registration will be opened up for anyone in either group to register for any course, based on availability.</p> <p>Each group has priority for courses in their group. All courses are repeated for three consecutive weeks for each group. Available courses can be seen at the following URL: http://www.usg.edu/gafirst/fin/training/ver8/training_events/schedule.pdf.</p> <p>You may register one person per course offered during Closed registration.</p>
Action Required:	Register Super Users for Super User Training by clicking on the links in the document referenced above.
Deadline:	January 11, 2008
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
Subject:	User Acceptance Testing (UAT) Information and Registration
Message:	<p>Registration is now open for all User Acceptance Testing (UAT) sessions. You may register up to two attendees per session.</p> <ul style="list-style-type: none"> • Who? Each institution may send two super users per module. • What? UAT (User Acceptance Testing) is the first opportunity each institution has to see an upgraded version of its database. During UAT, each institution is responsible for testing specific business processes in these pre-production copies of their data. Each session, below, will include 2 hours of orientation at the beginning of the allotted time. • When? January 28, 2008, to February 15, 2008 • Where? All institutions will be on site in Athens at the Office of Information and Instructional Technology (OIIT). For directions, please see the following URL: http://www.usg.edu/oit/directions.phtml. • Why? You are responsible for reviewing and executing core business processes in your own data as one of our key project milestones.
Action Required:	<p>Register attendees for UAT sessions using the following links:</p> <ul style="list-style-type: none"> • Budget Prep: http://bpuat.eventbrite.com • Purchasing & eProcurement: http://pouat.eventbrite.com • Payables & Expenses: http://apuat.eventbrite.com • Asset Management: http://amuat.eventbrite.com • General Ledger & Commitment Control: http://gluat.eventbrite.com • NOTE: The event password for all sessions is: V8
Deadline:	All attendees must register by Sunday, January 20, 2008 at midnight.
Respond To:	Michael Barnwell 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, Technical Representatives, and Certified Trainers
Subject:	PSFIN V8 Project January 2008 Institutional Readiness Web Conference
Message:	<p>The next monthly Institutional Readiness Web Conference has been scheduled for:</p> <ul style="list-style-type: none"> • 10:00 a.m. Wednesday, January 23, 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>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. The instructions are posted here: http://www.usg.edu/gafirst/fin/project/v8/news/events/. • Participate in this meeting Wednesday, January 23, 2007 at 10:00 a.m.
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
Subject:	Campus Upgrade Representatives
Message:	Each institution must identify one person to serve as your Campus Upgrade Representative. The roles and responsibilities of the Campus Upgrade Representative are described in detail in the job description document located here: http://www.usg.edu/gafirst/fin/project/v8/news/golive/ .
Action Required:	Please register your Campus Upgrade Representative at one of these links: <ul style="list-style-type: none">• Group 1: http://v8upgrepgroup1.eventbrite.com/• Group 2: http://v8upgrepgroup2.eventbrite.com/<ul style="list-style-type: none">• NOTE: The event password is: V8
Deadline:	Friday, February 1, 2008
Respond To:	<ul style="list-style-type: none">• Register your Campus Upgrade Representative at the links above.• 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:	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:	Friday, February 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:	Campus Coordinators and Security Administrators
Subject:	PSFIN V8 Security Workshops
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 several one-day Security Workshops in a lab environment.</p> <ul style="list-style-type: none"> • What: Security Workshops • When: February 1st – 15th, 8:30 a.m. – 4:30 p.m. <ul style="list-style-type: none"> • Note: There are several dates to choose from. • Where: OIIT, Athens • Who: V8 Security Administrators <p>We will work with your Security Administrator to establish V8 security profiles for your PeopleSoft Financials users. These security profiles will be set up in your institution's UAT 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 UAT database.</p> <ul style="list-style-type: none"> • Note: A revised Security Request Form has been posted to the website at: http://www.usg.edu/gafirst/fin/project/v8/documentation/technical/. <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 UAT environment and migrate it to your Production 8.9 environment.</p> <p>Note: This workshop is optional. You will have access to your UAT database after the UAT sessions are finished. Your Security Administrator will be able connect to the UAT database from your institution and create the security profiles without having to attend a workshop.</p>
Action Required:	<ul style="list-style-type: none"> • Task 1: Register for a Security Workshop online at: http://psfinv8-security.eventbrite.com. Your Security Administrator should go to this link and enter the requested information for one attendee from your institution. <ul style="list-style-type: none"> • NOTE: The event password is: V8 • Task 2: Prepare a Security Request Form for each existing core user in your Financials 7.5 system and bring it with you to the workshop. • Task 3: Build each user in their UAT environment and create all user

	security profiles before Go-Live.
Deadlines:	<ul style="list-style-type: none">• Task 1: Monday, January 21, 2008, no later than 5:00 p.m.• Task 2: Date of your scheduled workshop.• Task 3: A specific date will be announced.
Respond To:	Shelia Sloan at psfin_upgrade@usg.edu if you have any questions.

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