

PSFIN V8 Project Weekly Update for 06/23/2008

Tasks & Announcements		
Due Date	Description	Page
N/A	Reminder: Follow Up to the June 2008 Quarterly Update Meeting	3
N/A	Reminder: Archived eProcurement & Expenses Workflow Presentations	4
N/A	NEW: V8 Weekly Wimba Presentations	5
06/20/08	DUE: Identify Expenses Approvers: Department Manager 2	6
06/20/08	DUE: Update Training Plans	7
06/20/08	DUE: Identify Expenses Project Manager Reviewers	8
06/30/08	Identify AP Expense Auditors	11
06/30/08	Identify Expenses Reviewers	12
06/30/08	Update All Campus Representative Lists	13
07/23/08 and 08/20/08	Super User Training – Open Registration Available	16

Upcoming Events		
Date	Event	Page
06/24/08	NEW: V8 Wimba Presentation	9
06/30/08	Certified Trainer Webinar	14
07/16/08, 08/26/08, and 09/10/08	PSFIN V8 Institutional Readiness Web Conferences	15
08/06/08 and 09/10/08	PSFIN V8 Security Workshops	17

For More Information:

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:	<i>Reminder: Follow Up to the June 2008 Quarterly Update Meeting</i>
Message:	The slides for this meeting are available on the Georgia <i>FIRST</i> Financials website at: http://www.usg.edu/gafirst/fin/project/v8/news/events .
Action Required:	None
Deadline:	None
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:	Reminder: Archived eProcurement & Expenses Workflow Presentations
Message:	<p>The eProcurement & Expenses Workflow Presentations that were presented via Wimba Live Classroom on May 15th, 21st, and 28th and June 11th have been archived and are available for viewing.</p> <p>Although not mandatory, we suggest that the following personnel should plan to review these presentations, 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 review the presentations as well.</p>
Action Required:	<ul style="list-style-type: none"> • Before the viewing the presentations, test the computer you will be using to be sure you can enter the Wimba Live Classroom. • The Horizon Wimba Setup Wizard is located at: http://208.185.32.175/wizard/launcher.cgi?wc=hmqt. • Review the presentations as follows: <ul style="list-style-type: none"> • Go to: http://gbor-oiit.horizonwimba.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: first name_last name • Click on the Archives tab. • Select the appropriate presentation to review. • The PowerPoint presentation files are available at: http://www.usg.edu/gafirst/fin/project/v8/news/events.
Deadline:	N/A
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:	NEW: V8 Weekly Wimba Presentations
Message:	<p>A series of V8 Weekly Wimba Presentations will be given on a variety of topics. The first in this series will be held on Tuesday, June 24, 2008. Please see the item on page 9 for more information on this presentation.</p> <p>A listing of dates and topics for future presentations will be given in upcoming weekly updates.</p> <p>These presentations 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. • 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) • Participate in these meetings as scheduled
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:	<i>DUE: Identify Expenses Approvers: Department Manager 2</i>
Message:	<p>The following Expenses Approvers must be identified:</p> <ul style="list-style-type: none"> • Department Manager 2 <p>See the following documents, located at http://www.usg.edu/gafirst/fin/project/v8/documentation/jobs, for more information:</p> <ul style="list-style-type: none"> • “Expenses Approvers – General” for the job descriptions • “Expenses Workflow Levels” for a workflow levels discussion <p>A spreadsheet was mailed to Campus Coordinators on June 13th to collect this information. 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: Demonstrations on how to complete the spreadsheet were given at the eProcurement & Expenses Workflow Presentations that were held on May 15th and 21st. See the item on page 4 for more information on how to review these presentations.
Action Required:	<ul style="list-style-type: none"> • Follow the directions in the spreadsheet to provide the required information for your Expenses Department Managers. • Send your completed spreadsheet to the project team at the address below by the deadline.
Deadline:	<i>As soon as possible if you have not done so already.</i>
Respond To:	Sherral McKeithen at psfin_upgrade@usg.edu with completed spreadsheets 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 and Certified Trainers
Subject:	<i>DUE: Update Training Plans</i>
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:	<i>As soon as possible if you have not done so already.</i>
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>DUE: Identify Expenses Project Manager Approvers</i>
Message:	<p>Expenses workflow approval routing in 8.9 requires a Manager ID on the PROJECT 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>See the following documents, located at http://www.usg.edu/gafirst/fin/project/v8/documentation/jobs, for more information:</p> <ul style="list-style-type: none"> • “Expenses Approvers – General” for the job descriptions • “Expenses Workflow Levels” for a workflow levels discussion <p>A spreadsheet was mailed to Campus Coordinators on June 12th 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: Demonstrations on how to complete the spreadsheet were given at the eProcurement & Expenses Workflow Presentations that were held on May 15th and 21st. See the item on page 4 for more information on how to review these presentations.
Action Required:	<ul style="list-style-type: none"> • Follow the directions in the spreadsheet to provide the required information to complete all Manager ID fields in the Chartfield values for PROJECT. • Send your completed spreadsheet to the project team at the address below by the deadline.
Deadline:	<i>As soon as possible if you have not done so already.</i>
Respond To:	Sherral McKeithen at psfin_upgrade@usg.edu with completed spreadsheets 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:	NEW: V8 Wimba Presentation
Message:	<p>A V8 Wimba Presentation has been scheduled for:</p> <ul style="list-style-type: none"> • 10:00 a.m. Tuesday, June 24, 2008 <p>This presentation will include the following:</p> <ul style="list-style-type: none"> • Security Request Forms • Delegates and Designates • Another Look at Workflow Approvers <p>Although not mandatory, we suggest that the following personnel should plan to attend this presentation:</p> <ul style="list-style-type: none"> • Campus Coordinators • eProcurement Administrators • Expenses Administrators • Security Administrators <p>Other interested personnel are invited to attend as well.</p> <p>These presentations 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. • The Horizon Wimba Setup Wizard is located at: http://208.185.32.175/wizard/launcher.cgi?wc=hmqt. • Participate in this meeting. <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:	Tuesday, June 24, 2008 at 10:00 a.m.
Respond To:	Michael Casuccio at psfin_upgrade@usg.edu if you have questions.

**For More
Information:**

- 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 AP Expense Auditors
Message:	<p>The following Expenses users must be identified:</p> <ul style="list-style-type: none"> • AP Expense Auditors <ul style="list-style-type: none"> • NOTE: The Identify Expenses Approver Delegates task is on hold for now. <p>See the following documents, located at http://www.usg.edu/gafirst/fin/project/v8/documentation/jobs, for more information:</p> <ul style="list-style-type: none"> • “Expenses Approvers – General” for the job descriptions • “Expenses Workflow Levels” for a workflow levels discussion <p>Please review the job descriptions for these roles and identify who at your institution will be responsible for these duties.</p> <p>A spreadsheet was mailed to Campus Coordinators on June 20th 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: Demonstrations on how to complete the spreadsheet were given at the eProcurement & Expenses Workflow Presentations that were held on May 15th and 21st. See the item on page 4 for more information on how to review these presentations.
Action Required:	<ul style="list-style-type: none"> • Follow the directions in the spreadsheet to provide the required information for your AP Expense Auditors. • Send your completed spreadsheet to the project team at the address below by the deadline.
Deadline:	Monday, June 30, 2008
Respond To:	Sherral McKeithen at psfin_upgrade@usg.edu with completed spreadsheets 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:	Identify Expenses Reviewers
Message:	<p>The following Expenses users must be identified:</p> <ul style="list-style-type: none"> • Reviewers <p>See the following documents, located at http://www.usg.edu/gafirst/fin/project/v8/documentation/jobs, for more information:</p> <ul style="list-style-type: none"> • “Expenses Approvers – General” for the job descriptions • “Expenses Workflow Levels” for a workflow levels discussion <p>Please review the job descriptions for these roles and identify who at your institution will be responsible for these duties.</p> <p>A spreadsheet was mailed to Campus Coordinators on June 20th 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: Demonstrations on how to complete the spreadsheet were given at the eProcurement & Expenses Workflow Presentations that were held on May 15th and 21st. See the item on page 4 for more information on how to review these presentations.
Action Required:	<ul style="list-style-type: none"> • Follow the directions in the spreadsheet to provide the required information for your Expenses Reviewers. • Send your completed spreadsheet to the project team at the address below by the deadline.
Deadline:	Monday, June 30, 2008
Respond To:	Sherral McKeithen at psfin_upgrade@usg.edu with completed spreadsheets 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:	Update All Campus Representative Lists
Message:	<p>The following Campus Representative lists must be reviewed and updated if needed:</p> <ul style="list-style-type: none"> • Campus Coordinators • Technical Representatives • End User Support Representatives • Security Administrators • Campus Upgrade Representatives • Certified Trainers <p>Refer to the following documents for more information:</p> <ul style="list-style-type: none"> • Campus Contacts –All, located at http://www.usg.edu/gafirst/fin/project/v8/contacts/, for the current contact information. • Job Descriptions, located at http://www.usg.edu/gafirst/fin/project/v8/documentation/jobs/, for the job descriptions for these representatives.
Action Required:	<ul style="list-style-type: none"> • Review the Campus Representative lists noted above. • Confirm that current information is OK or update it as needed. • Send confirmation of current info and/or updated lists to project team.
Deadline:	Monday, June 30, 2008
Respond To:	Michael Casuccio at psfin_upgrade@usg.edu with confirmations and/or updated lists 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:	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:	Monday, June 30, 2008 at 10:00 a.m.
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, July, 16, 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:	Wednesday 16, July, 2008 for both Groups 1 and 2
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 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:	<ul style="list-style-type: none"> • Group 1: Wednesday, July 23, 2008 • Group 2: Wednesday, August 20, 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 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 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"> • A revised Security Request Form will be posted to the PSFIN V8 website on or about June 9th 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 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 the Pre-Production environment and create all user security profiles before Go-Live.
Deadlines:	<ul style="list-style-type: none"> • 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