

## PSFIN V8 Project Weekly Update for 01/28/2008

Tasks & Announcements		
Due Date	Description	Page
01/31/08	<i>Reminder:</i> PS Financials Month Close Process and Data Cleanup	3
08/01/08	<i>Reminder:</i> Active Employees, Core Financials Users, and Self Registration in HRMS	4

Upcoming Events		
Date	Event	Page
01/28/08 - 02/15/08	User Acceptance Testing (UAT)	2

For More Information:
<p>Visit the PSFIN V8 Project web site at: <a href="http://www.usg.edu/gafirst/fin/project/v8/">http://www.usg.edu/gafirst/fin/project/v8/</a>            Contact the PSFIN V8 Project team at: <a href="mailto:psfin_upgrade@usg.edu">psfin_upgrade@usg.edu</a></p>

<b>To:</b>	Campus Coordinators
<b>Subject:</b>	User Acceptance Testing (UAT)
<b>Message:</b>	<p>User Acceptance Testing (UAT) sessions are starting today, January 28, 2008, and will be held until February 15, 2008 at OIIT in Athens. For directions, please see the following URL:  <a href="http://www.usg.edu/oit/directions.phtml">http://www.usg.edu/oit/directions.phtml</a>.</p> <p>Prior to arrival, you should:</p> <ul style="list-style-type: none"> <li>• Review the UAT agenda.</li> <li>• Review all business process documents.</li> <li>• Walk through the UPK Try It mode for UAT business processes.</li> <li>• Write down any lingering questions for discussion.</li> </ul> <p>You should bring:</p> <ul style="list-style-type: none"> <li>• Print outs of UPK business processes for the session you are attending.</li> <li>• Your Bank Reconciliation file.</li> <li>• Your questions.</li> </ul> <p>Details are posted on the UAT page at:  <a href="http://www.usg.edu/gafirst/fin/project/v8/news/uat/">http://www.usg.edu/gafirst/fin/project/v8/news/uat/</a>. Here you will find a link to the UPK player and links to the business processes documents.</p>
<b>Action Required:</b>	Review UAT details at the location above and have materials ready to bring to UAT sessions.
<b>Deadline:</b>	<b>Monday, January 28 through Friday, February 15, 2008 as scheduled</b>
<b>Respond To:</b>	Michael Barnwell at <a href="mailto:psfin_upgrade@usg.edu">psfin_upgrade@usg.edu</a> if you have any questions.
<b>For More Information:</b>	<ul style="list-style-type: none"> <li>• Visit the PSFIN V8 Project web site at: <a href="http://www.usg.edu/gafirst/fin/project/v8/">http://www.usg.edu/gafirst/fin/project/v8/</a></li> <li>• Contact the PSFIN V8 Project team at: <a href="mailto:psfin_upgrade@usg.edu">psfin_upgrade@usg.edu</a></li> </ul>

<b>To:</b>	Campus Coordinators AND Accounting Staff
<b>Subject:</b>	<b>Reminder: PS Financials Month Close and Data Cleanup Processes</b>
<b>Message:</b>	<p><b>Please remember that data cleanup is a continuous process.</b> Every month until we go live with PeopleSoft Financials version 8.9, each institution should take the following steps to clean up your data so that your database is prepared to Go-Live!</p> <ol style="list-style-type: none"> <li>1. The person in your Business Office that manages the month end close process should use the updated Month End Checklist for PeopleSoft Financials 7.5 for all month end closes beginning with the December 2007 accounting period. It includes tasks that act as "practice runs" for the upgrade process</li> <li>2. Each institution should run through the instructions in the Data Cleanup Instructions document and then clean up the data as needed. This will insure that your production data remains clean, and will help minimize problems when we transition to the new version of PeopleSoft Financials.</li> </ol> <p>The updated Month End Checklist and the Data Cleanup Instructions are located at:  <a href="http://www.usg.edu/gafirst/fin/project/v8/documentation/general/">http://www.usg.edu/gafirst/fin/project/v8/documentation/general/</a>.</p> <p>If you require OIIT's assistance to resolve any data cleanup tasks, you should submit your ticket to the <b>OIIT HELPDESK</b>.</p>
<b>Action Required:</b>	<ul style="list-style-type: none"> <li>• Notify your business office that they should be performing the tasks in the updated version of the month end checklist every month end until Go-Live!</li> <li>• Add the data cleanup tasks to your month end checklists and run through the data cleanup tasks document every month until Go-Live!</li> <li>• Submit <b>OIIT HELPDESK</b> tickets if needed for these tasks.</li> </ul>
<b>Deadline:</b>	<b>Every month end until Go-Live!</b>
<b>Respond To:</b>	<a href="mailto:psfin_upgrade@usg.edu">psfin_upgrade@usg.edu</a> if you have any questions.
<b>For More Information:</b>	<ul style="list-style-type: none"> <li>• Visit the PSFIN V8 Project web site at: <a href="http://www.usg.edu/gafirst/fin/project/v8/">http://www.usg.edu/gafirst/fin/project/v8/</a></li> <li>• Contact the PSFIN V8 Project team at: <a href="mailto:psfin_upgrade@usg.edu">psfin_upgrade@usg.edu</a></li> </ul>

<b>To:</b>	Campus Coordinators
<b>Subject:</b>	<b>Reminder: Active Employees, Core Financials Users, and Self Registration in HRMS</b>
<b>Message:</b>	<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><b><u>If you are:</u></b></p> <ol style="list-style-type: none"> <li>1. An existing Core FIN user and you HAVE registered for HR Self Service using your Core FIN UserID, <b>no action is required.</b></li> <li>2. An existing Core FIN user and HAVE NOT registered for HR Self Service, <b>you must register using your current FIN UserID.</b></li> <li>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, <b>you must:</b> <ul style="list-style-type: none"> <li>• <b>Contact your security administrator and have them delete your HR Self Service UserID.</b></li> <li>• <b>Then log in to HRMS Self Service and complete the registration process again, using the same UserID as your FIN UserID.</b></li> </ul> </li> <li>4. Both a Core FIN user and a Core HRMS user, <b>you have two choices:</b> <ol style="list-style-type: none"> <li>a. <b>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></li> <li>b. <b>You can choose to have your security admin delete one of your User IDs and rebuild it using your primary UserID. The new</b></li> </ol> </li> </ol>

	<p><b>account would have the same roles as the previous account.</b></p> <p><b>Note 1:</b> 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><b>Note 2:</b> 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>
<b>Action Required:</b>	<p>Require all active employees to register for Self Service and enter a primary E-mail account.</p> <p><b>Note:</b> 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>
<b>Deadline:</b>	<b>Tuesday, August 1, 2008</b>
<b>Respond To:</b>	Shelia Sloan at <a href="mailto:psfin_upgrade@usg.edu">psfin_upgrade@usg.edu</a> if you have any questions.
<b>For More Information:</b>	<ul style="list-style-type: none"> <li>Visit the PSFIN V8 Project web site at: <a href="http://www.usg.edu/gafirst/fin/project/v8/">http://www.usg.edu/gafirst/fin/project/v8/</a></li> <li>Contact the PSFIN V8 Project team at: <a href="mailto:psfin_upgrade@usg.edu">psfin_upgrade@usg.edu</a></li> </ul>