



## Where are You with Data Cleanup?

By now, manual data cleanup tasks should be underway in your production database. **Have you all started?** As noted in the last issue, a set of queries and reports were included with the PSFIN release 2.44, along with instructions and guidelines for their use, to help you prepare for the V8 Project data conversion. These reports and queries will provide a listing of data that needs to be re-searched and then cleaned up or removed.

**Please remember that data cleanup is a continuous process.** From this point forward, each institution should run through the instructions in the Data Cleanup document and then clean up the data as needed once each month until we go live with the new software. This will ensure that your production data remain clean, and will help minimize problems when we transition to the new version of PeopleSoft Financials. If you require OIIT's assistance to resolve any data cleanup tasks, you must submit your ticket to the **OIIT HELPDESK no later than** the due dates listed in the cleanup document. As of the end of February, we have received 133 requests for assistance, have closed 68 of those tickets, and the remaining tickets are in progress. Journal issues are awaiting input from auditors for validation of the cleanup process.

MODULE	TASK
PO	<ul style="list-style-type: none"> <li>• Vendor Cleanup</li> <li>• Prior Year and through 01/2007</li> </ul>
AM	<ul style="list-style-type: none"> <li>• Prior Year and through 01/2007</li> </ul>
Requisitions	<ul style="list-style-type: none"> <li>• All</li> </ul>
GL	<ul style="list-style-type: none"> <li>• Prior Year and through 01/2007</li> </ul>
AP	<ul style="list-style-type: none"> <li>• Budget Check Vouchers</li> <li>• Verify Pay Cycles</li> <li>• Close PO Vouchers</li> <li>• Outstanding Checks</li> <li>• Outstanding Vouchers (Prior Years)</li> <li>• Bank Reconciliations</li> </ul>

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## Training Road Show is Coming Your Way!

### The Training Road Show is coming to a site near you!

OIIT is conducting Training Road Shows in the coming weeks. The purpose of these events is to:

- Communicate the training strategy and the Certified Trainer program
- Demonstrate the User Productivity Kit (UPK)
- Listen to the concerns institutions have about training

The events are designed to be informal, and involve sharing information along with discussion. For your convenience, we have organized three regionally grouped sessions and assigned each institution to the session closest to it. Space is limited to two people from each institution.

If your institution has a schedule conflict with the event in your region, your Campus Coordinator may e-mail us to see if there is availability at an event in another region. As space is limited, preference goes to those who are assigned to a particular session.

#### 1. Northern Session - OIIT, Athens, GA

- Tuesday, March 27<sup>th</sup>
- 1:30 p.m. - 4:30 p.m.

#### 2. Central/South Session - Middle Georgia College, Cochran, GA

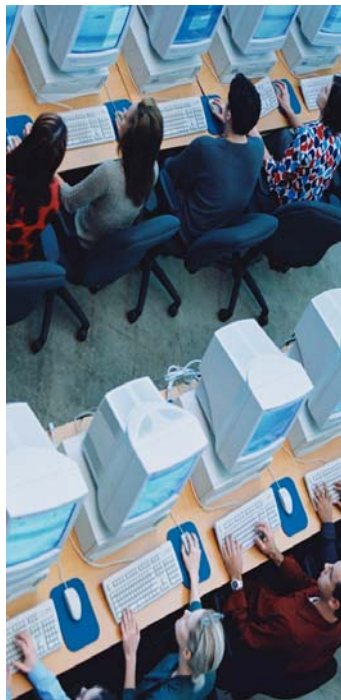
- Wednesday, March 28<sup>th</sup>
- 1:30 p.m. - 4:30 p.m.

#### 3. Southeast Session - Armstrong Atlantic State University, Savannah, GA

- Wednesday, April 11<sup>th</sup>
- 1:30 p.m. - 4:30 p.m.

Please refer to the weekly update for more details, or contact the project team at [psfin\\_upgrade@usg.edu](mailto:psfin_upgrade@usg.edu) if you have any questions about these events.





## Institutional Readiness/Process Improvement

Did you know you could attend a meeting with your USG colleagues from across the state and never leave your campus? Well, 115 representatives from every GeorgiaFIRST institution did just that during the first Institutional Readiness (IR) Web Conference held on February 21<sup>st</sup>.

The location of this meeting is a live virtual meeting room using Horizon Wimba Live Classroom through an Internet connection. In other words, it's a virtual conference call. The biggest advantage to such a virtual meeting is eliminating all the extra time and expense involved in traveling across the state.

Most institutions arranged a central meeting place on campus to allow several people from their institution to participate at one time. One attendee commented that "this is a great way to have a meeting."

**What happens at an IR Web Conference and why do we have these conference calls?** The purpose of these monthly web conferences is to foster communication between the institutions and the PSFIN V8 Project Team. These meetings will include project updates, details on required tasks, upcoming events, open discussions, and an opportunity to ask questions about the project. It is critical to the success of this project that each institution have at least one representative present at each monthly meeting. According to the Project Scorecard that has been mentioned in previous issues, one measure of Institutional Readiness is the number of institutions that participate in each IR web conference.

**How did we do?** The first meeting was a huge success. With representatives from all 33 institutions attending, we had 100% participation and rated a green status for that item on the project Score Card. (continued on page 3)

*"Learning is about more than simply acquiring new knowledge and insights; it is also crucial to unlearn old knowledge that has outlived its relevance. Thus, forgetting is probably at least as important as learning."*

**Gary Ryan Blair**

## April Quarterly Update Meeting—Register Today!

**Where:** Macon State College

**When:** Monday, April 16, 2007, 9:00 am to 4:30 pm

**Who:** Campus Coordinator, Technical Representative, and up to two other attendees from each institution

**What:** You'll get to learn about the PSFIN V8 Upgrade, how it impacts you, and what you should be doing now to prepare

**How Much:** It's Free!

**Agenda and Materials:** Available at:

<http://www.usg.edu/gafirst/fin/project/v8/>

**Register:** Contact Michael Casuccio at [psfin\\_upgrade@usg.edu](mailto:psfin_upgrade@usg.edu) no later than April 9<sup>th</sup> with your institution's attendees

## January Quarterly Update Meeting

**Thanks** to everyone who participated in the first PSFIN V8 Project Quarterly Update Meeting! Held at Macon State College on January 23, 2007, there were over 150 attendees from 35 USG institutions.

Among the agenda items covered were the Project Success Scorecard, Fit/Gap Committee Member reports, and the Training strategy. Presenters included Lougene Brown (Columbus State University), Bill Filtz (Valdosta State University), Wanda Aldridge (Gainesville State College), Karen Gardner (Kennesaw State University), Bill Bowes (USO), and Tom Maier (USO).

Documentation from this meeting is located at the GeorgiaFIRST Financials website under **Project Information, V8 Project**. You can also navigate to the following URL for information on this and other PSFIN V8 Project events:

<http://www.usg.edu/gafirst/fin/project/v8/news/events/>



## Institutional Readiness/Process Improvement Continued

(continued from page 2)

**What happens the rest of the month?** Every Monday, a "Weekly Update" document is sent to each institution detailing project events, tasks, and deadlines. These items will be added to the Institutional Readiness checklist. Every month, Chelle Stringer will conduct an assessment of each institution's progress on the Institutional Readiness checklist. Each institution and the project team are responsible for making this project a success. Chelle's job is to help us all keep the project on schedule.

**Need more information?** All documents related to this and future IR Web Conferences will be accessible on the project website at: <http://www.usg.edu/gafirst/fin/project/v8/news/events>. There you will find answers to questions submitted at the meeting, a copy of the presentation slides, and instructions for viewing the recorded archive of the Web Conference.

We would like to thank everyone for attending this first IR Web Conference, and look forward to your participation in future conferences. See the **Ahead on the PSFIN V8 Project Calendar** section for dates of upcoming web conferences.



## Look Ahead!

### Ahead on the PSFIN V8 Project Calendar...

#### Quarterly Update Meetings

- 04/16/07
- 08/28/07 (Technical Update Only)
- 11/08/07

#### Institutional Readiness (IR) Web Conferences\*

- 03/21/07
- 04/16/07 (combined with Quarterly Update Meeting)
- 05/23/07
- 06/20/07

#### User Acceptance Testing

- 10/01/07 – 12/31/07

#### Training

- 11/01/07 – 03/20/08

\* Dates after the March IR web conference are proposed, and will be confirmed at the March IR web conference.

## Development Subteam



The Development subteam will lead the technical development for modifications to the PeopleSoft-delivered Financials version 8.9, and any BOR-added customizations that may be needed to eliminate gaps in the required functionality. Among other tasks, the Development subteam will create/modify code and perform unit testing to ensure adherence to design specifications, and develop secure interfaces between internal and external systems using the optimum integration tools.

*L to R: Deidre Crawford, Karen Dykstra (team lead), Rod Reynolds, Ben Khuwatsamrit, Michael Campbell, and Alice Bray*





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## Learner Characteristics Survey

The results of the **Learner Characteristics Survey** that was sent out to all PeopleSoft Financials users is in. These five areas were covered:

1. What institutions expect from PeopleSoft Financials training.
2. The institutions' ability to support PSFIN V8 training.
3. The training deployment approach.
4. The timing of training.
5. The current PeopleSoft Financials users' skill level and their future training needs.

The findings of this survey indicate that:

1. Respondents endorse key PSFIN V8 Training Strategy assumptions:
  - Training program must focus on how to complete tasks in PSFIN and should include an end-to-end business process overview.
  - End Users should receive the necessary training to minimize interruptions at Go-Live.
  - A sustainable training infrastructure should be build to support on-going and future technology initiatives.
  - Super User base should be developed to support/train End Users.
2. Institutions have the ability to support PSFIN V8 training:
  - Experienced in organizing/supporting classroom and online learning.
  - Have resources to support End User learning.
  - Value cost savings and productivity increases from online learning.
3. Respondents are receptive to the blended training deployment approach:
  - Believe classroom, self-paced, and online learning are all effective.
  - Do not believe that only classroom training should be used.
4. Respondents prefer to be trained by Go-Live:
  - Super User and End User training should occur before Go-Live.
  - Believe that some training topics can occur after Go-Live.
5. Respondents are skilled in using Internet browsers:
  - Often use the Internet for work and personal tasks.
  - Have participated in online training.

The Training subteam will hold further discussions with institutions about these items in the upcoming Training Road Show meetings. The PSFIN V8 training strategy will then be revised accordingly. **Thanks to everyone who participated in this survey!**

## Stay in the Know

Here are some of the ways we'll be communicating with you throughout the PSFIN V8 Project:

1. V8 Project Team: Contact them at [psfin\\_upgrade@usg.edu](mailto:psfin_upgrade@usg.edu)
2. Campus Coordinators: Find yours at: <http://www.usg.edu/gafirst/fin/project/v8/>
3. GeorgiaFIRST Financials web site: <http://www.usg.edu/gafirst/fin/>
4. Email Lists:
  - [gafirst-fs-reps@listserv.usg.edu](mailto:gafirst-fs-reps@listserv.usg.edu): includes all V8 Campus Coordinators
  - [gafirst-fs-tech@listserv.usg.edu](mailto:gafirst-fs-tech@listserv.usg.edu): includes all V8 Technical Representatives
  - [first-lf@listserv.usg.edu](mailto:first-lf@listserv.usg.edu): includes all Financials users
  - [first-lb@listserv.usg.edu](mailto:first-lb@listserv.usg.edu): includes all Budgets users

**NOTE:** If you are not currently subscribed to any of these email lists, you can contact the **OIIT HELPDESK** at: [http://www.usg.edu/customer\\_services](http://www.usg.edu/customer_services) (self-service ticket submission) or email [helpdesk@usg.edu](mailto:helpdesk@usg.edu).