



# PSFIN V8 Project

PeopleSoft Financials Version 8.9

June 2007  
Newsletter

## Training Update

The Training Road Show sessions provided us invaluable information on your training concerns. Thanks! We enjoyed meeting with everyone and were pleased with the very productive discussions. You had great suggestions, and we took them back to Athens and began working on them right away. Read how we responded to your requests in the **You Spoke, We Listened** chart below.

We have asked each institution to designate a Certified Trainer, and we will have a kick-off at the June Institutional Readiness (IR) Web Conference call. Then we will begin working with your Certified Trainer to create a successful training plan for your institution.

In the near future, we will also ask your institution to designate a Super User for each module. Although there may be adjustments needed later, this will assist us with the planning and scheduling we are currently doing for the Super User training events. Super User training will focus on the changes from version 7.5 to 8.9 (delta training). The training schedule will be designed to accommodate those who need training in more than one area.

Stay tuned for more news on the progress we are making together!

You Spoke	We Listened
You requested more information on the training strategy.	We conducted three Training Road Shows throughout the system to listen to your concerns about the training strategy, communicate the training strategy in more detail, and demonstrate the UPK.
You requested more information specifically related to technical issues.	We created an agenda focused on technical topics for the Quarterly Update Meeting scheduled for Wednesday, August 29, 2007. More information is located elsewhere in this issue.
You requested a UPK demo so Campus Coordinators could show this to the appropriate people at their institutions.	We presented a demonstration of UPK player at the May IR web conference call.
You requested that a sample UPK topic be posted to the PSFIN web site so users could review this directly whenever they had the time.	A sample UPK topic – Purchasing, Budget Check a PO Online – has been posted to the website. This sample uses actual institution data. Go to <a href="http://www.usg.edu/gafirst/fin/training/ver8">http://www.usg.edu/gafirst/fin/training/ver8</a> .
You requested making UPK content available to Certified Trainers as soon as possible so they could begin training their users, especially the non-traditional ones, early.	We will begin making UPK content available in October instead of December as originally scheduled. This will include Expenses, eProcurement, and module-specific critical processes that will be tested during the User Acceptance Testing (UAT) period.

## Inside this issue:

<i>Training Update</i>	1
<i>You Spoke, We Listened</i>	1
<i>Stay in the Know</i>	1
<i>April Quarterly Update Meeting</i>	2
<i>Institutional Readiness Update</i>	2
<i>You Have Questions, We Have Answers</i>	2
<i>Architecture Subteam</i>	3
<i>What Does THAT Mean?</i>	3
<i>Look Ahead!</i>	3
<i>Save the Date!</i>	3
<i>August Quarterly Update Meeting</i>	3



A publication of the OIIT  
GeorgiaFIRST Financials  
Production Support Group

Office of Information and  
Instructional Technology  
2500 Daniells Bridge Road  
Building 300  
Athens, GA 30606  
706-583-2000



## Stay in the Know

If you have any questions or concerns about the project, contact the PSFIN V8 Project Team at:  
[psfin\\_upgrade@usg.edu](mailto:psfin_upgrade@usg.edu)

Information and documents related to the project can be found at:

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

## April Quarterly Update Meeting

The April Quarterly Update meeting in Macon was a huge success, mainly because representatives from every institution participated. According to Tom Maier, who opened the meeting, your involvement has been the key element in the project's successes to date. The Institutional Readiness portion of the Project Success Scorecard has stayed in the "green," indicating that you are doing your part to meet deadlines, attend meetings, and provide feedback when requested. Bill Bowes also discussed the scorecard and areas of future emphasis for meeting these success criteria.

A key agenda item was the presentation of the new Expenses module. Donna Wooddell and Abi Okunsanya gave a brief demonstration of this functionality, including the process to enter an

expense report. Michael Barnwell also presented highlights from the Training road shows and demonstrated the UPK training tool.

Action items from this update meeting, and all meetings are posted on the GeorgiaFIRST Financials website under V8 Project Information at the following URL: <http://www.usg.edu/gafirst/fin/project/v8/news/events/>.

Please join us for the next update meeting on August 29, where the focus will be on technical issues and information. See you then!

## Institutional Readiness Update

How do we measure success for this project? It's important to have a shared understanding of success so that everyone can work toward the same goals. The Project Success Scorecard for the PSFIN V8 Project outlines those goals and the criteria we will use to determine whether we are achieving those goals.

The Scorecard contains four criteria. All criteria have specific measures to determine whether the status for that item is green, yellow, or red.

To this point, our efforts have been focused on criteria 1, 2, 3a, and 3b. These will remain important, but the focus will now include criteria 3c and all of criteria 4, as user training becomes a major focus. Read more about the training initiative on page 1.

The full Project Success Scorecard is located at: <http://www.usg.edu/gafirst/fin/project/v8/documentation/general/>

### Project Success Scorecard Criteria Summary

1. Improved Functionality
2. Fewer Modifications
3. Institutional Readiness (for all 33 institutions)
  - a. Complete checklist items
  - b. Participate in readiness calls
  - c. Change business procedure to take advantage of best practices
  - d. Designate and train end user support person
4. Trained Users
  - a. Designate a Certified Trainer
  - b. Designate and train Super User for each module
  - c. Train end users.
  - d. Train 75% of traditional end users
  - e. Train 75% of non-traditional end users

## You Have Questions, We Have Answers

***Will the Expenses Module require departure and arrival times to determine which meals someone is entitled to for travel?***

The system will require depart and arrive times. However, they will not be used by the system to determine meal eligibility. This will still be a manual process done by someone like the AP auditor.

***When will we get the security model from OIIT?***

A draft of the full model should be available in September at Georgia Summit 2007. We plan to send out user request forms prior to that time so institutions may start collecting user data.

***In the Expenses Module, if a manager wants to approve a lesser amount than what was requested on the expense report, where is this done?***

When the manager reviews the expense report for approval, he can return the request to the employee with comments about what he wants to change and have the employee change it, or he can make the change and add comments as to why the change was made. The employee can view these changes on the expense report.

***Will we receive table information?***

Table information can be found in PeopleSoft's Entity Relationship Diagrams or ERDs. We have published these documents on the GeorgiaFIRST Financials website at: <http://www.usg.edu/gafirst/fin/project/v8/documentation/technical/>.

## Architecture Subteam



*Standing, L to R: Rodney Latimer, Terry Smith, James Schwind, Charles Weeks, Kelly Mills, Truman White, Ken Kling, Andy Walker, and Bill Van Wie  
Sitting, L to R: Daphene Blackmon, Tim Sykes (team lead), Bruce Johnson, Agnes Okoye, Rod Reynolds, Jeff Evans, and Michael Campbell  
Not in Photo: Alice Bray, Denise Fulton, Sharon Logan*

The Architecture subteam will plan for, procure, implement, optimize, and support the required infrastructure/architecture items, such as databases, physical and logical servers, network components, and workstations throughout the project lifecycle from development and testing through training and implementation.

They will ensure that the system is carefully tested with regards to performance, response time and integration, as well as ensure that the system is appropriately secured in a manner that is consistent with the best practices defined by the USG security team. They will also prepare to support this web-based infrastructure once it moves into production.

## What Does THAT Mean?

<b>Go-Live!</b>	The date of final changeover from the current version of PeopleSoft Financials to the new version 8.9. Go-Live is technically the extended weekend that OIIT takes the Production databases down with the expectation that when the databases are brought back up, they will be at the new version 8.9.
<b>UAT</b>	<b>User Acceptance Testing</b> User testing of critical business processes in an upgraded, pre-production copy of their database. Users must test and sign off on these processes within the specified time period. UAT sessions will take place in Athens with support from the OIIT PSFIN V8 Project Team.
<b>UPK</b>	<b>User Productivity Kit</b> A browser-based training tool which offers multiple modes of use to provide simulated instruction and re-enforcement of learning to a PeopleSoft user. UPK is one of the training delivery methods of the PSFIN V8 Project.

## Look Ahead!

### Quarterly Update Meetings

08/29/07 (Technical Update)

### Institutional Readiness (IR)

#### Web Conferences

06/21/07

07/19/07

### User Acceptance Testing

10/29/07 – 01/14/08

### Training

11/01/07 – 03/20/08

## Save the Date!

### August Quarterly Update Meeting

**Where:** Macon State College, Auditorium K

**When:** Wednesday, August 29, 2007, 9:00 am to 4:30 pm

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

**What:** Proposed agenda posted on the GeorgiaFIRST Financials web site:  
<http://www.usg.edu/gafirst/fin/project/v8/news/events/>

The focus of this Quarterly Update Meeting is to provide information about the technical impact of the PSFIN V8 project. Technical reps from each campus are encouraged to attend.

