

PSFIN V8 Project Schedule Extended

A joint memo from William Bowes and Tom Maier, dated October 19, 2007, announced to all GeorgiaFIRST institutions that the timeline for the PSFIN V8 Project has been extended by one month. This gives us the opportunity to enhance the final product and to give each institution an additional amount of time to prepare for Go Live. A copy of this memo is available at: <http://www.usg.edu/gafirst/fin/project/v8/documentation/general/>.

New dates for some major milestones are shown below:

User Acceptance Testing

- Groups 1 and 2 combined: 01/28/08 - 02/15/08
- UAT schedule and details located at: <http://www.usg.edu/gafirst/fin/project/v8/news/uat/>

Super User Training

- Group 1: 02/18/08 – 03/07/08
- Group 2: 03/10/08 – 03/28/08
- Super User Training schedule and details located at: http://www.usg.edu/gafirst/fin/training/ver8/training_events/

Go Live!

- Group 1: 04/07/08
- Group 2: 05/15/08

Travel & Expenses Module

- The new Travel & Expenses module will be implemented for all employee expense reimbursements at all GeorgiaFIRST institutions effective **July 1, 2008**.

What Is System Test?



Testing encompasses a continuing **quality assurance** effort, integrated throughout all aspects of the project. The goal of testing is to identify as **early as possible** any errors, omissions, misunderstandings, or opportunities for improvement within the scope of the project in order to minimize risk. The Functional subteam officially began the 6 month internal system test on July 16, 2007. It is due to complete December 31, 2007.

A script that does not execute properly is a failed script. A script can fail because the documentation is not correct or the results when executed against the database are not as expected. All failed scripts are evaluated and resolved, either functionally or technically, and re-tested in order to ensure that the results

are now acceptable. The primary objective of the system test is to ensure that the PeopleSoft Financial applications support the business requirements of USG.

In System Test, members of the functional sub-team will execute 3,515 test conditions against copies of production databases upgraded to V8.9. As of this writing, the project team has successfully tested 3375 of these processes. Representatives from each of the GeorgiaFIRST institutions will be testing a subset of these conditions in upgraded copies of your own databases during User Acceptance Testing (UAT).

See you in January!

Stay in the Know

- Contact the PSFIN V8 Project Team at: psfin_upgrade@usg.edu
- Visit the PSFIN V8 Project web site at: <http://www.usg.edu/gafirst/fin/project/v8/>

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You Spoke

We Listened

You asked us to provide a consolidated Institutional Readiness Task list that shows all the tasks each institution will be required to perform through Go-Live.	We created an IR task list that shows all tasks that will be required all the way up to Go-Live. The list is in the form a "To Do" list so you can check off each task as you complete them. The list was distributed at Georgia Summit and is also available at: http://www.usg.edu/gafirst/fin/project/v8/news/weekly/ .
You asked for a way to still see the budget period in the Actuals Ledger.	We utilized an additional chart string filed called "Budget Reference" that will contain the related budget period.
You asked for a more convenient UAT schedule so that testers would not have to be in Athens on a Monday for orientation and then return later in the week for testing in a specific module.	We modified the UAT schedule to allow for orientation to be given at the beginning of each module testing session.
You asked that more than one user per institution be allowed to attend UAT.	We made arrangements to allow two users at a time to attend UAT.
You asked that the Expenses module would not Go-Live until the beginning of the fiscal year.	We created a plan where the Expenses module will Go-Live on July 1, 2008.

Why We Have Institutional Readiness Tasks



Institutional Readiness Tasks represent information or required actions that the V8 project team needs from each institution in order to successfully implement PeopleSoft Financials 8.9. Completing the tasks will benefit your institution by paving the way for a smooth transition to the new software.

The Institutional Readiness Checklist is a comprehensive list of Institutional Readiness Tasks listed by order of due date. This document is in the form of a To-Do list with boxes for you to check off when the task is completed. With this list you will be able to plan time and resources for upcoming task all the way through to your Go-Live date. This list is available at <http://www.usg.edu/gafirst/fin/project/v8/news/weekly/>.

We will notify you in the Weekly Update when any changes are made to the Institutional Readiness Checklist. If you have any questions regarding this checklist or about your status on any of the Institutional Readiness Tasks, please contact Chelle Stringer at chelle.stringer@usg.edu or 505.730.1222.

Your Comments from the August Quarterly Update Meeting

We asked attendees at the August Quarterly Update Meeting what their institutions were most excited about regarding the PSFIN V8 Project. Here are some of their comments.

PSFIN V8 Feature	Your Comments
Web-based Access	<ul style="list-style-type: none"> "We are excited that it will be web-based!" "Web-based and easily accessible data." "HR and Financials will look the same." "Having the ability to use current technology to run more processes electronically and have real time information."
Training	<ul style="list-style-type: none"> "Web based access and the UPK tool." "That people that have come aboard since we first went on PS will have access to in-depth training"
Expenses and eProcurement	<ul style="list-style-type: none"> "Integration for expenses and ePro (requisitioning) for non-traditional users, which eliminates third party apps – in theory – should reduce labor in business functions." "I'm looking forward to the online expense statement. Once everyone is trained, I believe it will be a great tool." "The workflow for expenses and the creation of the voucher in AP from employee-entered expense data."

Training Subteam



Back Row, L to R: Susan McDonough, Michael Barnwell (subteam lead), Marc Bello, and Phil Raymondo
Front Row, L to R: Jeanne Katz, Teresa Piazza, and Bobbi Edgar
Not in Photo: Jeanne Anne Davidson, Michael Casuccio, Terry Smith, and Toni Lyons

The Training subteam is developing and implementing a training strategy that will support the PSFIN V8 Project throughout the life of the project and beyond Go Live through:

- Development of a training infrastructure
- Development of training curricula and materials
- Delivery of end user training
- Creation of training assessments
- Defining a training maintenance plan

The goals of this training strategy are to:

- Prepare all end users with the knowledge they need to perform their work with minimal interruption at Go Live.
- Develop a Super User base who can effectively train and/or provide support to their peers and other end users.
- Build a sustainable training infrastructure ongoing and future technology initiatives.

The Training subteam has developed a “blended” training deployment approach that will involve both instructor-led classroom and GeorgiaVIEW Vista-based online learning activities. Each institution has nominated a Certified Trainer, who will complete trainer preparation developed by the Training subteam and lead the end user training effort at their institutions. The Training subteam will support all of the institution training activities, and will support on-going maintenance training after Go Live.

Look Ahead!

Quarterly Update Meetings

- 12/05/2007

Institutional Readiness (IR) Web Conferences

- Next meeting at Quarterly Update Meeting on 12/05/2007
- January meeting on 01/23/2008

User Acceptance Testing

- 01/28/2008 – 02/15/2008

Training

Super User Training

- Group 1: 02/18/08 – 03/07/08
- Group 2: 03/10/08 – 03/28/08

End User Training

- Group 1: Starts 02/25/08
- Group 2: Starts 03/17/08

