

PSFIN V8 Project Weekly Update for 02/25/2008

Tasks & Announcements		
Due Date	Description	Page
02/18/08 – 03/28/08	<i>Updated:</i> User Acceptance Testing (UAT) – Follow Up	2
02/18/08 – 03/28/08	<i>NEW:</i> Workstation Installation and Configuration Instructions and Files for PSFIN V8 Users	4
02/18/08 – 03/28/08	<i>Updated:</i> Institution Queries and Trees during UAT	6
02/29/08	<i>Reminder:</i> PS Financials Month Close Process and Data Cleanup	8
08/01/08	<i>Reminder:</i> Active Employees, Core Financials Users, and Self Registration in HRMS	9

Upcoming Events		
Date	Event	Page
02/27/08	PSFIN V8 Project February 2008 Institutional Readiness Web Conference	7

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:	<i>Updated:</i> User Acceptance Testing (UAT) – Follow Up
Message:	<p>UAT Homework and Access to Your UAT Database Now that the UAT sessions in Athens are complete, your UAT database will be available for you to work on your homework assignments, and for local testing and development. You will have access to your UAT database from February 18th through March 28th.</p> <ul style="list-style-type: none"> • UAT Database Access. The web link to, and login information for, your institution's UAT has been sent to each institution's campus coordinator and technical representative via email. You will need to distribute this information to your UAT attendees and other personnel who need access to complete UAT homework or perform other local development and testing. • Homework Assignments. These were distributed during the UAT sessions and have been posted to the UAT page on the PSFIN website. • UAT Presentations. The files with the PowerPoint slides have been posted to the UAT page on the PSFIN website. • Workstation Configuration. Workstation Installation and Configuration Instructions have been posted. See the announcement on page 4. <p><u>Need help?</u> If you need assistance with your UAT homework or have any issues with your UAT database environment, please contact the OIIT HELPDESK through the usual channels and submit a ticket. Be sure to tell the OIIT HELPDESK representative that your request is related to PSFIN V8 UAT.</p> <p>Additional details are posted on the UAT page at: http://www.usg.edu/gafirst/fin/project/v8/news/uat/.</p>
Action Required:	<ul style="list-style-type: none"> • Work on UAT homework assignments and do any local testing and development. • Submit OIIT HELPDESK tickets if needed for these tasks.
Deadline:	Monday, February 18, 2008 through Friday, March 28, 2008
Respond To:	<ul style="list-style-type: none"> • psfin_upgrade@usg.edu if you have any project-related questions. • The OIIT HELPDESK if you need assistance with UAT homework assignments or have any issues related to your UAT environment.

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
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To:	Campus Coordinators and Technical Representatives
Subject:	NEW: Workstation Installation and Configuration Instructions and Files for PSFIN V8 Users
Message:	<p>The Workstation Installation Instructions document and related files are now available for download at: http://swdist.gafirst.usg.edu/financials/ps848wks/.</p> <p>These instructions and files contain the procedures to install and configure PeopleSoft Development tools such as SQR Reporting, nVision, Crystal 9 application, and the PeopleSoft ODBC link. This is for users who need to develop reports in PSFIN V8 using nVision and/or Crystal. Also included are procedures for configuring workstations for all users of PSFIN V8.</p> <p>The PS8 Workstation Install Scenarios spreadsheet will show the various installs needed for certain types of users. Special attention should be paid to the sections related to the SwiftView plug-in (used for viewing checks before printing), disabling pop-up blockers, and creating a trusted site in the document, as these will affect the majority of PSFIN V8 users.</p> <p>Note 1: Not everyone will need the PSFIN V8 Development tools. Only personnel who need to develop custom reports will need this type of workstation install. Although the number of people developing these reports will vary by institution, it is expected that the number would be very small: from 0 to 8 people per institution. However, everyone who accesses PSFIN V8 may benefit from having their browser correctly configured. It is expected that the Technical Representative or appropriate IT staff will have access to these files and will assist users with the installation and configuration as needed.</p> <p>Note 2: For Section 2.3.2, Configuration Manager Network Settings, you will need to have a unique machine name and port number. OIIT will send this information to each Technical Representative in a separate email message.</p>
Action Required:	Review the Workstation Installation Instructions and distribute to the appropriate IT Staff. During UAT and subsequent production environments, the IT staff may be asked to install these applications.
Deadline:	As needed during UAT campus testing from Monday, February 18, 2008 through Friday, March 28, 2008.
Respond To:	Michael Campbell at psfin_upgrade@usg.edu .

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
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To:	Campus Coordinators and Technical Representatives
Subject:	<i>Updated: Institution Queries and Trees during UAT</i>
Message:	<p><u>Queries During UAT</u></p> <ul style="list-style-type: none"> • <i>Updated:</i> The UAT environments have the institution queries that were created at Georgia Summit and in FPLAY89. These queries have all been made public in your UAT environments for easy access. • At Georgia Summit and in FPLAY89, you were asked to name the queries with the first three digits of your school number/business unit as all the queries were in a common database. For UAT, this restriction does not apply. <p><u>Trees During UAT</u></p> <ul style="list-style-type: none"> • During UAT, you may modify institution-specific trees. OIIT will move those trees into your production 8.9 environments. • There are no restrictions on what name is given to the institution-specific trees. <p><u>Queries and Trees During Pre-Production</u></p> <ul style="list-style-type: none"> • The UAT environments will be overwritten by the pre-production upgrade, so you must make sure all the queries and trees that you need have been moved.
Action Required:	<ul style="list-style-type: none"> • Notify all creators of queries and trees about the above process. • Provide a list of all queries and trees you want to include in your production 8.9 database that have been added, modified, or even deleted in your UAT environment.
Deadline:	<ul style="list-style-type: none"> • All additions, changes, and deletions must be submitted each Friday by 2 p.m. during UAT campus testing from Monday, February 18, 2008 through Friday, March 28, 2008. • Deadline for the final list is to be determined.
Respond To:	Karen Dykstra at psfin_upgrade@usg.edu .
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 February 2008 Institutional Readiness Web Conference
Message:	<p>The next monthly Institutional Readiness Web Conference has been scheduled for:</p> <ul style="list-style-type: none"> • 10:00 a.m. Wednesday, February 27, 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>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. The instructions are posted here: http://www.usg.edu/gafirst/fin/project/v8/news/events/. • Participate in this meeting Wednesday, February 27, 2007 at 10:00 a.m.
Deadline:	As noted above
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 Accounting Staff
Subject:	Reminder: PS Financials Month Close and Data Cleanup Processes
Message:	<p>Please remember that data cleanup is a continuous process. 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"> 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 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. <p>The updated Month End Checklist and the Data Cleanup Instructions are located at: http://www.usg.edu/gafirst/fin/project/v8/documentation/general/.</p> <p>If you require OIIT's assistance to resolve any data cleanup tasks, you should submit your ticket to the OIIT HELPDESK.</p>
Action Required:	<ul style="list-style-type: none"> • 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! • Add the data cleanup tasks to your month end checklists and run through the data cleanup tasks document every month until Go-Live! • Submit OIIT HELPDESK tickets if needed for these tasks.
Deadline:	Every month end until Go-Live!
Respond To:	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

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

	<p>account would have the same roles as the previous account.</p> <p>Note 1: 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>Note 2: 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>
Action Required:	<p>Require all active employees to register for Self Service and enter a primary E-mail account.</p> <p>Note: 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>
Deadline:	Tuesday, August 1, 2008
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