

## PSFIN V8 Project Weekly Update for 04/07/2008

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For More Information:	
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>	

<b>To:</b>	Campus Coordinators
<b>Subject:</b>	<b>Reminder: User Acceptance Testing (UAT)</b>
<b>Message:</b>	<p><b>Reminder: All UAT Homework assignments and any local testing and development must be completed no later than Friday, April 11<sup>th</sup>. You will have no access to your UAT database after April 11<sup>th</sup>.</b></p> <p><b>UAT Homework and Access to Your UAT Database</b>  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 18<sup>th</sup> through <b>April 11<sup>th</sup></b>.</p> <ul style="list-style-type: none"> <li>• <b>UAT Database Access.</b> 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.</li> <li>• <b>Homework Assignments.</b> These were distributed during the UAT sessions and have been posted to the UAT page on the PSFIN website.</li> <li>• <b>UAT Presentations.</b> The files with the PowerPoint slides have been posted to the UAT page on the PSFIN website.</li> <li>• <b>Workstation Configuration.</b> Workstation Installation and Configuration Instructions have been posted. See the announcement on page 6.</li> </ul> <p><b><u>Need help?</u></b>  If you need assistance with your UAT homework or have any issues with your UAT database environment, please contact the <b>OIIT HELPDESK</b> through the usual channels and submit a ticket. Be sure to tell the <b>OIIT HELPDESK</b> representative that your request is related to PSFIN V8 UAT.</p> <p>Additional 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>.</p>
<b>Action Required:</b>	<ul style="list-style-type: none"> <li>• Work on UAT homework assignments and do any local testing and development.</li> <li>• Submit <b>OIIT HELPDESK</b> tickets if needed for these tasks.</li> </ul>
<b>Deadline:</b>	<b>Friday, April 11, 2008</b>

<b>Respond To:</b>	<ul style="list-style-type: none"><li>• <a href="mailto:psfin_upgrade@usg.edu">psfin_upgrade@usg.edu</a> if you have any project-related questions.</li><li>• The <b>OIIT HELPDESK</b> if you need assistance with UAT homework assignments or have any issues related to your UAT environment.</li></ul>
<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><i>Reminder: AP UAT Homework Requiring Bank Approval</i></b>
<b>Message:</b>	<p><b><i>Reminder: All AP UAT Homework that requires bank approval must be completed no later than Friday, April 11<sup>th</sup>. You will have no access to your UAT database after April 11<sup>th</sup>.</i></b></p> <p>This is a reminder regarding AP UAT Homework that requires bank approval. <b><u>All institutions</u></b> are required to produce AP test checks and provide them to their bank for approval. In addition, institutions that are currently using (or plan to use at 8.9 Go Live!) positive payment or direct deposit (PPD/CCD+) are also required to submit test files to their bank for approval.</p>
<b>Action Required:</b>	<p>Produce and submit the test files to your bank for approval as noted above by running the following PSFIN V8 Business Processes/UPKs:</p> <ul style="list-style-type: none"> <li>• <b>AP.020.502</b> Run EFT/ACH Pay Cycle (if applicable)</li> <li>• <b>AP.020.503</b> Print Test Checks from Report Manager (required for all institutions)</li> <li>• <b>AP.040.030</b> Generate the Positive Payment File (if applicable)</li> </ul> <p>Email confirmation of bank approval to OIIT. Please specify which items were approved by the bank:</p> <ul style="list-style-type: none"> <li>• AP Checks</li> <li>• EFT-PPD file</li> <li>• ACH-CCD+ file</li> <li>• Positive Pay file</li> </ul> <p>If your files are not approved by your bank and you need OIIT assistance, please open a PSFIN V8 UAT <b>OIIT HELPDESK</b> ticket, as noted in the User Acceptance Item (UAT) item on page 2.</p>
<b>Deadline:</b>	<b>Friday, April 11, 2008</b>
<b>Respond To:</b>	Donna Wooddell at <a href="mailto:psfin_upgrade@usg.edu">psfin_upgrade@usg.edu</a> .
<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 Technical Representatives
<b>Subject:</b>	<b><i>Reminder: Workstation Installation and Configuration Instructions and Files for PSFIN V8 Users</i></b>
<b>Message:</b>	<p><b><i>Reminder: All UAT Homework that requires installation and configuration of PeopleSoft Development tools such as SQR Reporting, nVision, Crystal 9 application, and the PeopleSoft ODBC link must be completed no later than Friday, April 11<sup>th</sup>. You will have no access to your UAT database after April 11<sup>th</sup>.</i></b></p> <p>The latest Workstation Installation Instructions (version 3) document and related files are available for download at:  <a href="http://swdist.gafirst.usg.edu/financials/ps848wks/">http://swdist.gafirst.usg.edu/financials/ps848wks/</a>.</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><b>Note 1: Not everyone will need the PSFIN V8 Development tools.</b> 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. <b>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.</b></p> <p><b>Note 2:</b> 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>
<b>Action Required:</b>	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 and/or assist with configuration.

<b>Deadline:</b>	<b>Friday, April 11, 2008</b>
<b>Respond To:</b>	If you need assistance with this, have your Technical Representative or appropriate IT support person contact Michael Campbell at <a href="mailto:psfin_upgrade@usg.edu">psfin_upgrade@usg.edu</a> .
<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 Technical Representatives
<b>Subject:</b>	<b><i>Reminder: Institution Queries and Trees during UAT</i></b>
<b>Message:</b>	<p><b><i>Reminder: All additions, changes, and deletions to UAT institution queries and trees must be submitted no later than Friday, April 11<sup>th</sup>. You will have no access to your UAT database after April 11<sup>th</sup>.</i></b></p> <p><b><u>Queries During UAT</u></b></p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> </ul> <p><b><u>Trees During UAT</u></b></p> <ul style="list-style-type: none"> <li>• During UAT, you may modify institution-specific trees. OIIT will move those trees into your production 8.9 environments.</li> <li>• There are no restrictions on what name is given to the institution-specific trees.</li> </ul> <p><b><u>Queries and Trees During Pre-Production</u></b></p> <ul style="list-style-type: none"> <li>• 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.</li> </ul>
<b>Action Required:</b>	<ul style="list-style-type: none"> <li>• Notify all creators of queries and trees about the above process.</li> <li>• Provide a list of all queries and trees you want to include in your production 8.9 database that have been <b>added, modified, or even deleted</b> in your UAT environment.</li> </ul>
<b>Deadline:</b>	<ul style="list-style-type: none"> <li>• <b>All additions, changes, and deletions must be submitted by 2 p.m. Friday, April 11, 2008.</b></li> <li>• Deadline for the final list is to be determined.</li> </ul>
<b>Respond To:</b>	Karen Dykstra at <a href="mailto:psfin_upgrade@usg.edu">psfin_upgrade@usg.edu</a> .
<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 Certified Trainers
<b>Subject:</b>	Super User Training – Closed Registration Open
<b>Message:</b>	<p>Closed Super User Training registration is now open through Friday, April 18<sup>th</sup>. Closed registration means that you can register only for courses for your group (Group 1 or Group 2). After April 18<sup>th</sup>, registration will be opened up for anyone in either group to register for any course, based on availability. Each group has priority for courses in their group.</p> <p>The Super User Training course schedule is posted on the PSFIN web site, and can be seen at the following URL:  <a href="http://www.usg.edu/gafirst/fin/training/ver8/training_events/schedule.pdf">http://www.usg.edu/gafirst/fin/training/ver8/training_events/schedule.pdf</a>.</p> <p><b>Note:</b> To register each session, click on the hyperlink for the session in the schedule, which will take you to the registration site. The password to use for the registration site is: <b>V8</b>.</p>
<b>Action Required:</b>	Register Super Users for Super User Training by clicking on the links in the document referenced above.
<b>Deadline:</b>	<b>Friday, April 18, 2008</b>
<b>Respond To:</b>	Michael Barnwell at <a href="mailto:psfin_upgrade@usg.edu">psfin_upgrade@usg.edu</a> if you have 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, Technical Representatives, and Certified Trainers
<b>Subject:</b>	PSFIN V8 Project April 2008 Institutional Readiness Web Conference
<b>Message:</b>	<p>The next monthly Institutional Readiness Web Conference has been scheduled for:</p> <ul style="list-style-type: none"> <li>• <b>10:00 a.m. Wednesday, April 23, 2008</b></li> </ul> <p>Participation in these monthly meetings is vital to the success of the V8 Project and is therefore <b>mandatory</b>. 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>
<b>Action Required:</b>	<ul style="list-style-type: none"> <li>• <b>Before the meeting</b>, test the computer you will be using to be sure you can enter the Wimba Live Classroom. The instructions are posted here: <a href="http://www.usg.edu/gafirst/fin/project/v8/news/events/">http://www.usg.edu/gafirst/fin/project/v8/news/events/</a>.</li> <li>• <b>Participate in this meeting Wednesday, April 23, 2008 at 10:00 a.m.</b></li> </ul>
<b>Deadline:</b>	As noted above
<b>Respond To:</b>	<a href="mailto:psfin_upgrade@usg.edu">psfin_upgrade@usg.edu</a> if you have 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 Security Administrators
<b>Subject:</b>	PSFIN V8 Security Workshops
<b>Message:</b>	<p>Your V8 Security Administrator will be responsible for creating user security profiles for your V8 Financials environment before you Go-Live. In order to assist you with this task, the PSFIN V8 Project team is conducting two one-day Security Workshops in a lab environment.</p> <ul style="list-style-type: none"> <li>• What: Security Workshops</li> <li>• When: 8:30 a.m. – 4:30 p.m. <ul style="list-style-type: none"> <li>• Group 1: August 6, 2008</li> <li>• Group 2: September 10, 2008</li> </ul> </li> <li>• Where: OIIT, Athens</li> <li>• Who: V8 Security Administrators</li> </ul> <p>We will be covering the changes to security, and then we will work with your Security Administrator to establish V8 security profiles for your core PeopleSoft Financials users. These security profiles will be set up in your institution's Pre-Production database and will be migrated to your Production database at Go-Live.</p> <p>Your Security Administrators will need to prepare a Security Request Form for each of your existing core users in the Financials 7.5 system. These forms will document each user's access in the system, as well as each user's job roles that will be used to build V8 role assignments in your Pre-Production database.</p> <ul style="list-style-type: none"> <li>• <b>Note:</b> A revised Security Request Form will be posted to the PSFIN V8 website on or about June 1<sup>st</sup> at:  <a href="http://www.usg.edu/gafirst/fin/project/v8/documentation/technical/">http://www.usg.edu/gafirst/fin/project/v8/documentation/technical/</a>.  Also, all business processes will be updated with the correct security role.</li> </ul> <p>The forms will be used during the workshop to build each core user with required role assignments. After the workshops, OIIT will extract your user security profiles from the Pre-Production environment and migrate it to your Production 8.9 environment.</p>
<b>Action Required:</b>	<ul style="list-style-type: none"> <li>• <b>Task 1: Register for a Security Workshop online at:</b> <ul style="list-style-type: none"> <li>• Group 1: <a href="http://securitygrp1.eventbrite.com/">http://securitygrp1.eventbrite.com/</a></li> <li>• Group 2: <a href="http://securitygrp2.eventbrite.com/">http://securitygrp2.eventbrite.com/</a> <ul style="list-style-type: none"> <li>• <b>NOTE: The event password is: V8</b></li> </ul> </li> <li>• Your Security Administrator should go to the appropriate link and enter the requested information for <b>one</b> attendee from your institution.</li> </ul> </li> <li>• <b>Task 2:</b> Prepare a Security Request Form for each existing core user in</li> </ul>

	<p>your Financials 7.5 system and bring it with you to the workshop.</p> <ul style="list-style-type: none"><li>• <b>Task 3:</b> Build each user in the Pre-Production environment and create all user security profiles before Go-Live.</li></ul>
<b>Deadlines:</b>	<ul style="list-style-type: none"><li>• <b>Task 1: Sunday, June 1, 2008, no later than 5:00 p.m.</b></li><li>• <b>Task 2:</b> Date of your scheduled workshop.</li><li>• <b>Task 3:</b> Date of your scheduled workshop.</li></ul>
<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>