

Georgia*FIRST* Training Roadmap for 2018



Please . . .

- Silence phone
- Take survey
- Discuss on social media using #USGGS17



Presenter

Karen Schwind

Georgia*FIRST*

Training and Communications Specialist



Agenda

- 2016 Training Survey
- Documentation
- Classes
- Videos
- Ongoing Training Surveys
- 2018

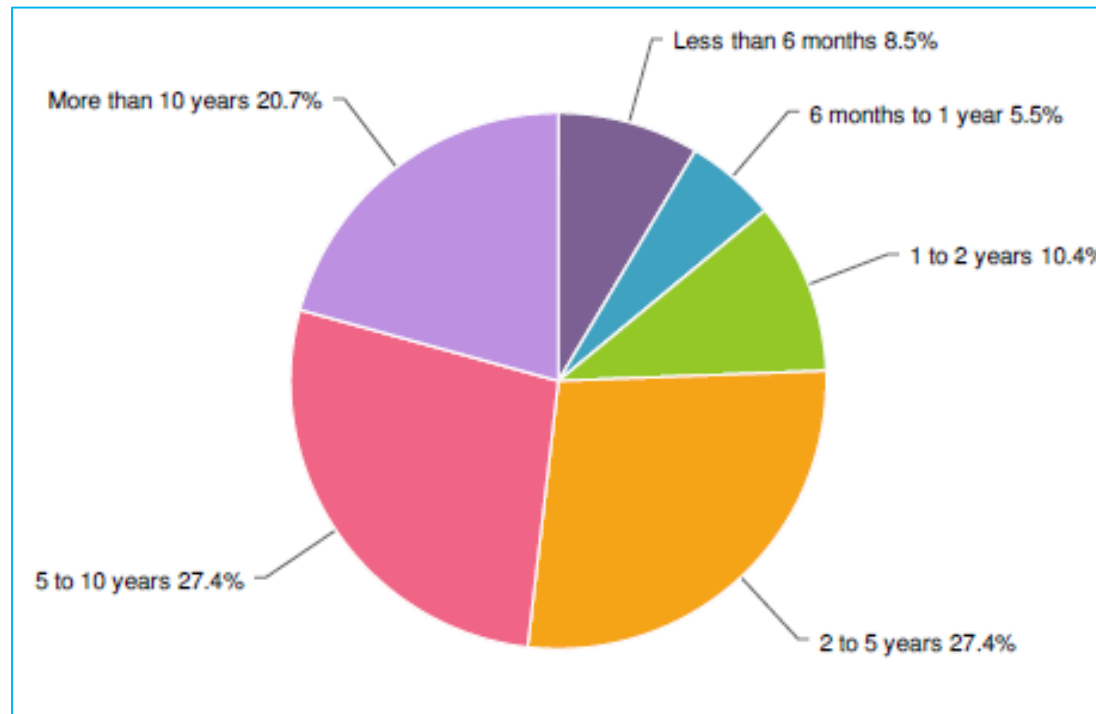


I. 2016 Training Survey Results: What Do Users Need From Us?

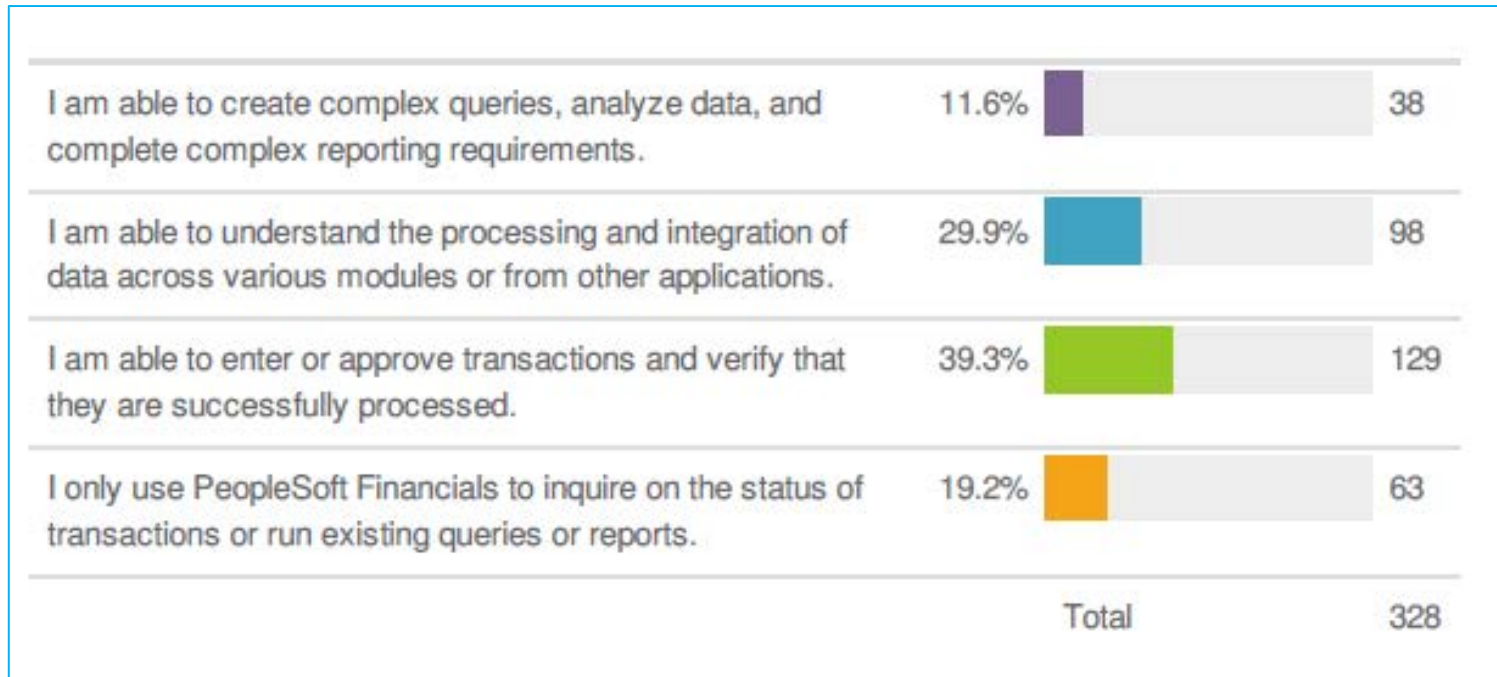


328 Completed Survey

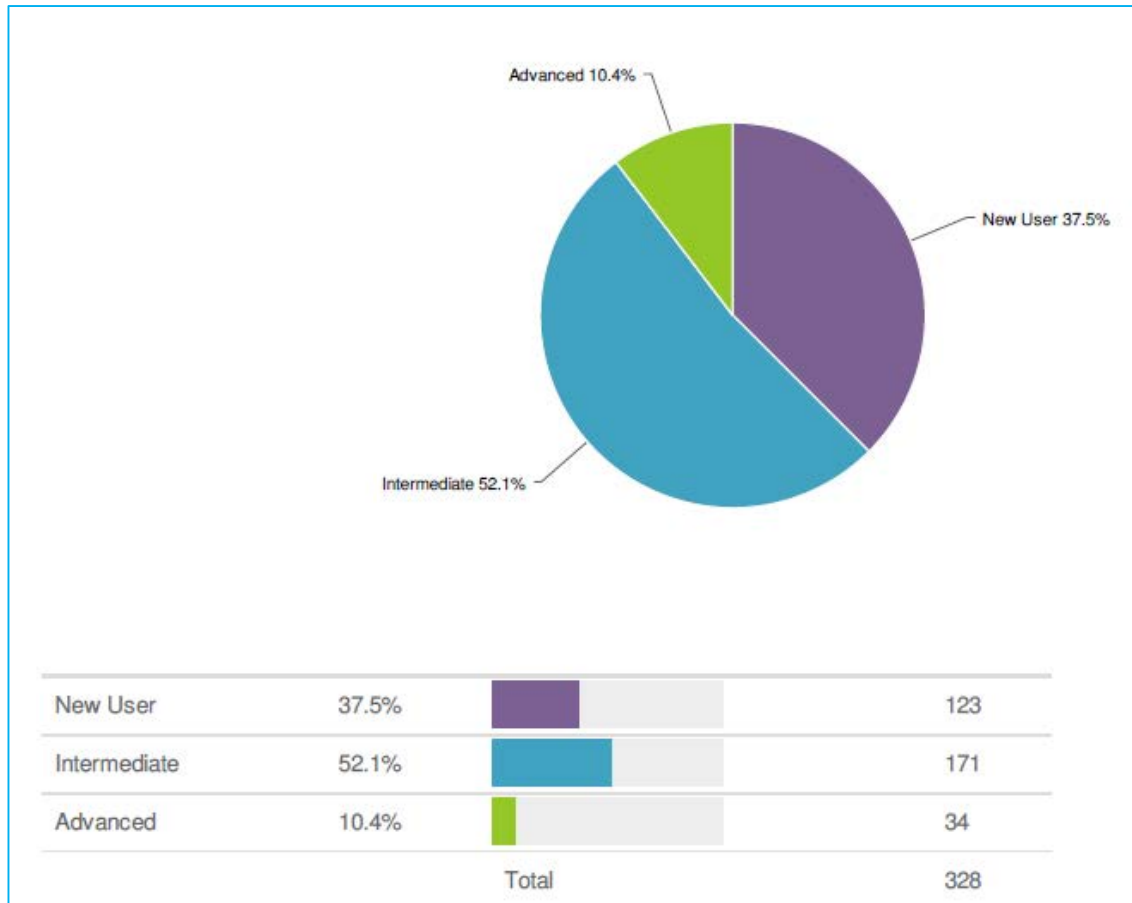
Please indicate how long you've been working with PeopleSoft Financials.



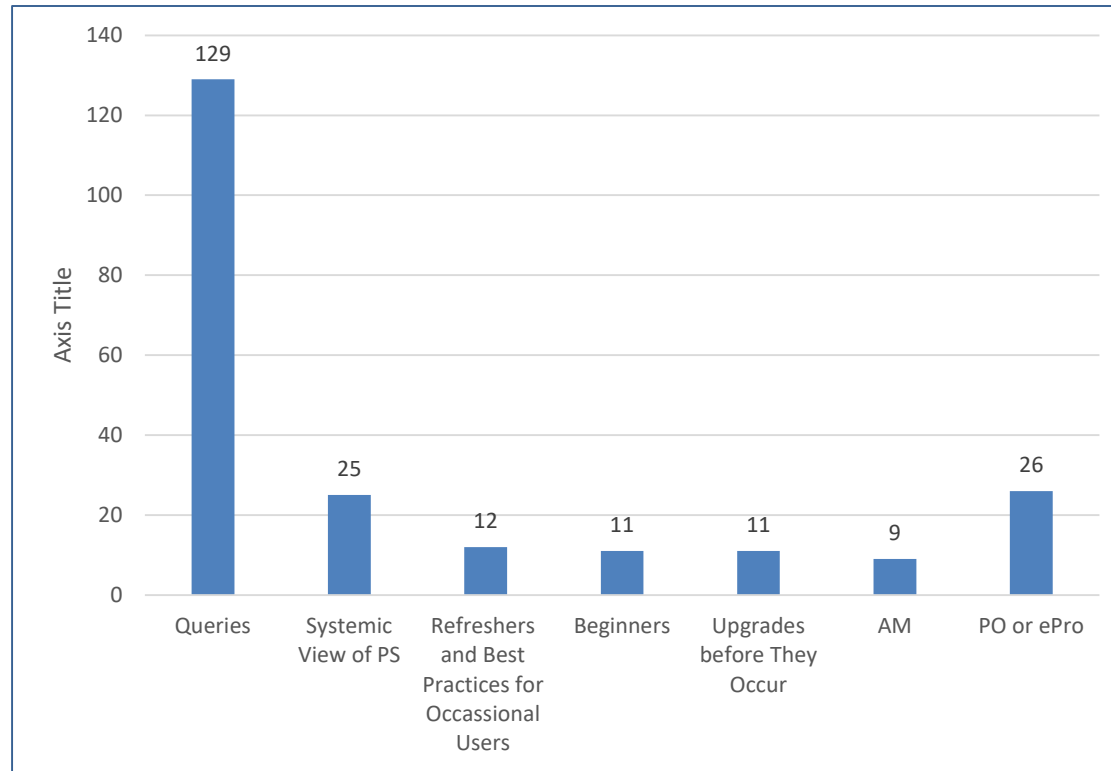
How would you rate your level of proficiency with PeopleSoft Financials?



What level of training do you think is most needed for PeopleSoft Financials users?



Top 7 Training Needs



II. Documentation: What are users reading?



GEORGIAFIRST
Information Technology Services

Delivering Trusted Financial Management Solutions

- Home
- Documentation +
- Announcements
- Known Issues +
- Releases +
- Project Information
- Training +
- iStrategy/Reporting +
- Budget Issues Committee
- Support

PeopleSoft Financials was implemented at the teaching institutions of the University System of Georgia, along with the University System Office (USO), under the project name "GeorgiaFIRST" in January 1998. The GeorgiaFIRST PeopleSoft Financials application model is a fully integrated, Oracle-based technology suite of software applications managing the financial data that meet BOR and USG institutional needs for information used in decision-making. The single application model and a consolidated database containing the data for all institutions are centrally hosted at ITS, and ITS distributes all software upgrades and releases. This web site provides information relevant to the model application, including business processes and changes or updates to the model, as well as many informational aids and tips.

Some pages in this site contain proprietary information and are restricted to University System of Georgia personnel. To obtain a user name and password, contact the ITS Helpdesk.

Latest Announcements

Find the latest GeorgiaFIRST information about announcements concerning new or updated documentation, relevant system-wide changes, recent and upcoming releases, database changes, and more.

Latest Known Issues

Known Issues describe any functional area in PeopleSoft Financials that does not work as it is designed to work. Known Issue documentation typically includes the issue, a functional workaround and an estimated resolution.

Subscribe to our mailing list

This list is intended for all customers of the GeorgiaFIRST PeopleSoft Financials application. If you are a Budget User responsible for creating/maintaining budgets at your institution, please click the radio button at the bottom of this form to also sign up for the first-lb@listserv.uga.edu listserv.

* indicates required

Email Address *

First Name *

Georgia*FIRST* Website 2017

- Users based on mailing list: 617
- Documents: 340
- Unique Views: 3541



Jan. 1-Mar 31, 2017

All Documents with +10 Unique Views	# UV	Module
AP_Payments.zip	48	Accounts Payable
AP_Vouchers.zip	46	Accounts Payable
AM_Assets_AM.020.zip	37	Asset Management
BOR_Spreadsheet_Upload_Files_PS92_PT855_11032016.zip	35	General Job Aids
FY2018_Budget_Prep_Users_Guide.pdf	32	Budget Prep
1099_Processing_Users_Guide_for_CY_2016.pdf	29	Accounts Payable
Accounts_Payable_Business_Process_Index_R4.0_01-01-2016.pdf	27	Accounts Payable
Travel_Expenses_EX_-_Administration_and_Processing.zip	26	Travel & Expenses
FY2017_Mid-Year_Workshop_Documents.zip	21	Fiscal Year End
General_Ledger_Business_Process_Index_R3.1_11-19-2012.pdf	21	GL & KK
Purchase_Orders_%282%29.zip	21	Purchasing



Jan. 1-Mar 31, 2017

- Total number of documents viewed: 156
- Total number of Unique Views: 1122

- Total number of documents viewed 10+: 36
- Total number of Unique Views: 700

62%



April 1 –June 30, 2017

All Documents with 10+ Unique Views	UV	Module
Accounts_Payable_%28AP%29_-_Vouchers.zip	54	Accounts Payable
Year_End_Processing_and_Closing_Manual_2017_FINAL.pdf	52	Fiscal Year End
Sub-Module_Cleanup_and_Processing_2017_FINAL.pdf	39	Fiscal Year End
Journals.zip	33	GL & CC
General_Ledger_Business_Process_Index_R3.1_11-19-2012.pdf	30	GL & CC
Purchase_Orders_%282%29.zip	29	Purchasing
FY2018_Budget_Prep_Users_Guide.pdf	29	Budget Prep
Accounts_Payable_Business_Process_Index_R4.0_04-20-2017.pdf	28	Accounts Payable
AP_Payments.zip	27	Accounts Payable
BOR_Spreadsheet_Upload_Files_PS92_PT855_05202017.zip	26	General Job Aids
Asset_Management_%28AM%29_-_Assets.zip	24	Asset Management
9.2_AM_Queries_and_Reports_2016.pdf	23	Asset Management
AM_Month_End_AM.030.zip	22	Asset Management
FY2017_Year-End_Closing_Journal_Entries.xlsx	22	Fiscal Year End
Purchasing_Business_Process_Index_R30_11-17-2016.pdf	21	Purchasing
2016_Year-End_Documents.zip	20	Fiscal Year End
FY2017_Standard_and_Correcting_Journal_Entries.xlsx	20	Fiscal Year End
Key_9.2_Records_List_for_Queries_rev_05-26-2016.pdf	20	Query



April 1 –June 30, 2017

- Total number of documents viewed: 156
- Total number of Unique Views: 1415
- Total number of documents viewed 10+: 46
- Total number of Unique Views: 818

58%



July 1 –Sept 24, 2017

All Documents with 10+ Unique Views	UV	Module
Year_End_Processing_and_Closing_Manual_2017_FINAL.pdf	22	Fiscal Year End
Asset_Management_%28AM%29_-_Assets.zip	21	Asset Management
FY2017_Year-End_Closing_Journal_Entries.xlsx	20	Fiscal Year End
Benefits_Reconciliation_Module_-_Updating_Retiree_Benefit_Parameters.pdf	16	General Job Aids
TIGA_Reporting_Users_Guide_FY2017.pdf	16	<u>TIGA</u>
Salary_Data_for_TIGA_Reporting_FY2017.pdf	15	<u>TIGA</u>
Accounts_Payable_Journals.zip	14	Accounts Payable
Accounts_Payable_Vouchers.zip	14	Accounts Payable
BOR_Spreadsheet_Upload_Files_PS92_PT855_05202017.zip	13	General Job Aids
TIGA_Reporting_Users_Guide_FY2017.pdf	13	<u>TIGA</u>
Agency_TIGA_Letter_and_Final_Instructions_TIGA_FY2017_Salaries_and_Payments.pdf	13	<u>TIGA</u>
Asset_Management_Business_Process_Index_06-01-2017.pdf	13	Asset Management



July 1 –Sept 24, 2017

- Total number of documents viewed: 252
- Total number of Unique Views: 1004

- Total number of documents viewed 10+: 26
- Total number of Unique Views: 456

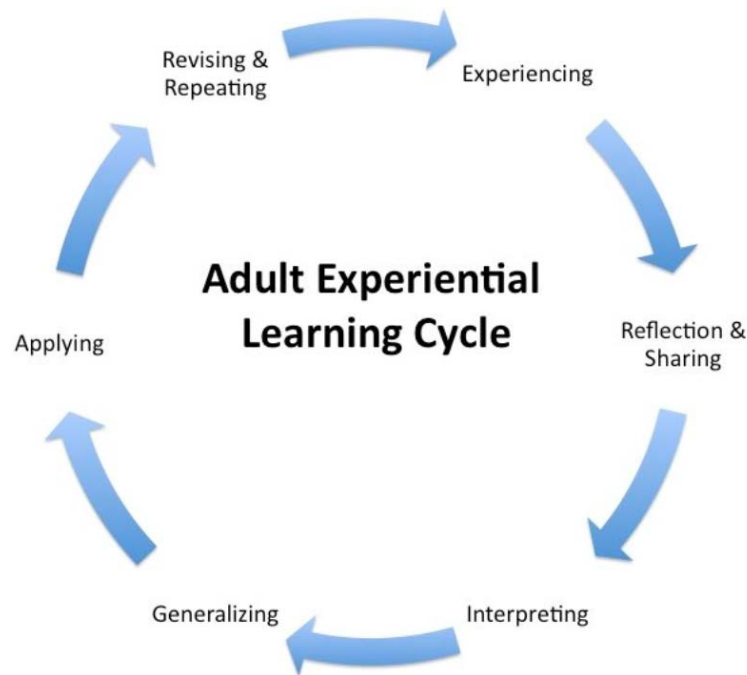
45%



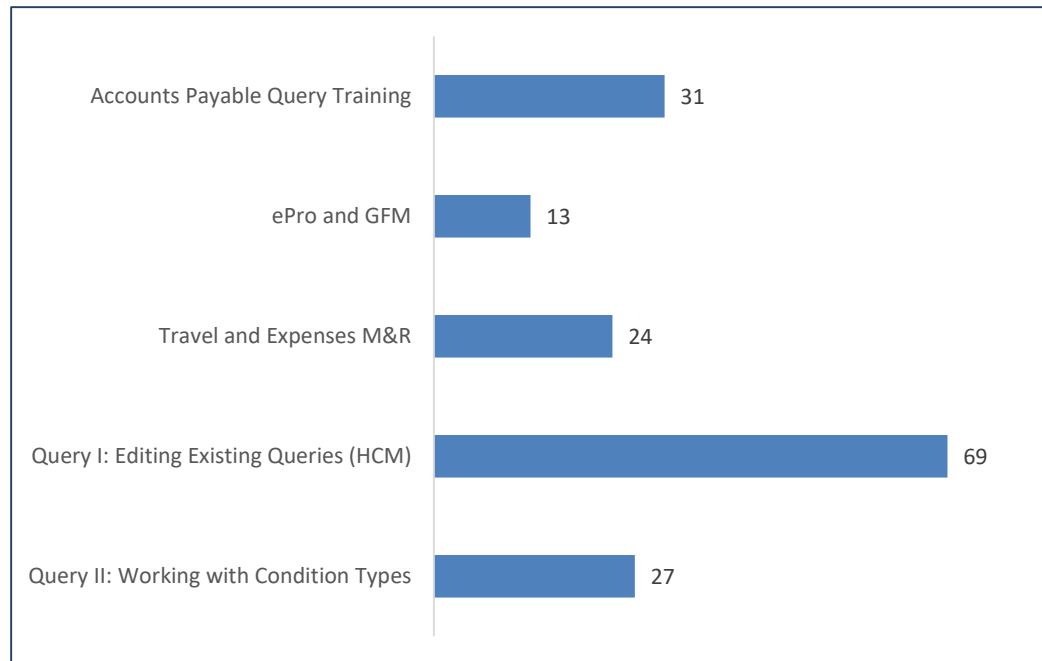
Questions



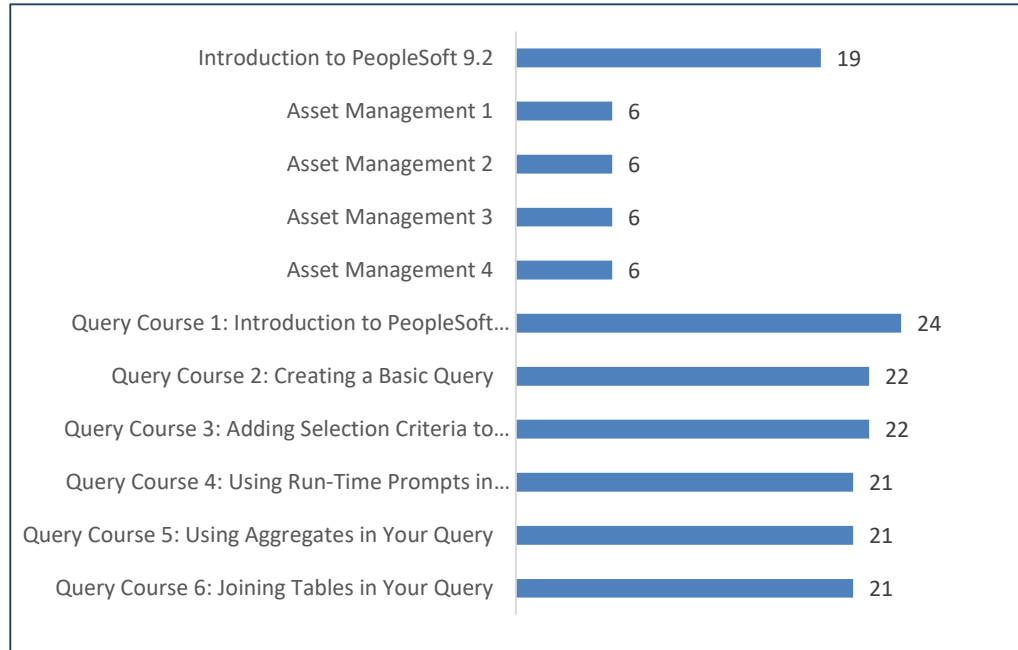
III. Classes: What training are users participating in?



Live or Live Online Classes

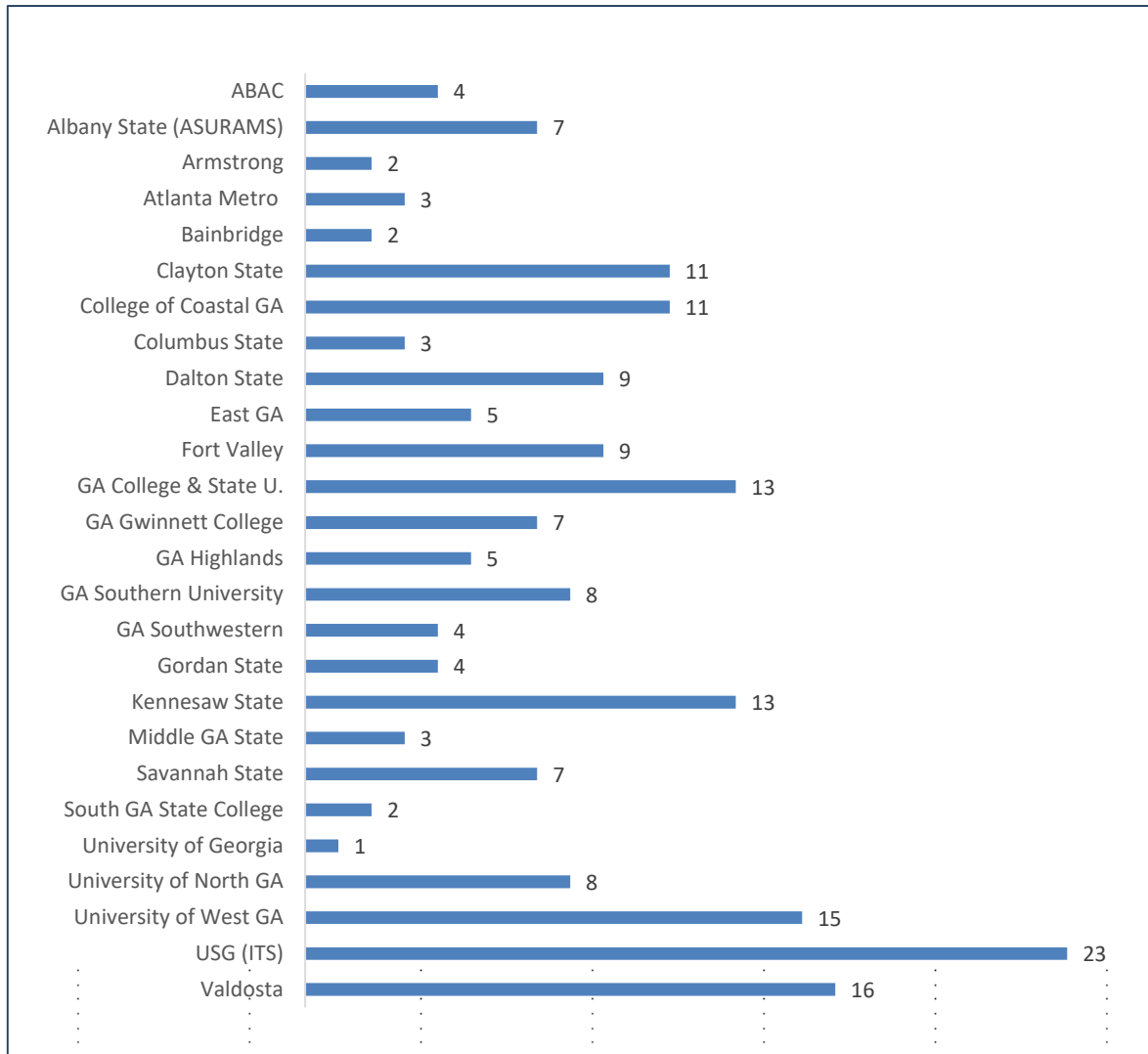


GeorgiaView Courses for Cont. Ed. Credits



Institutions Participating in Training

195 Participants



Questions



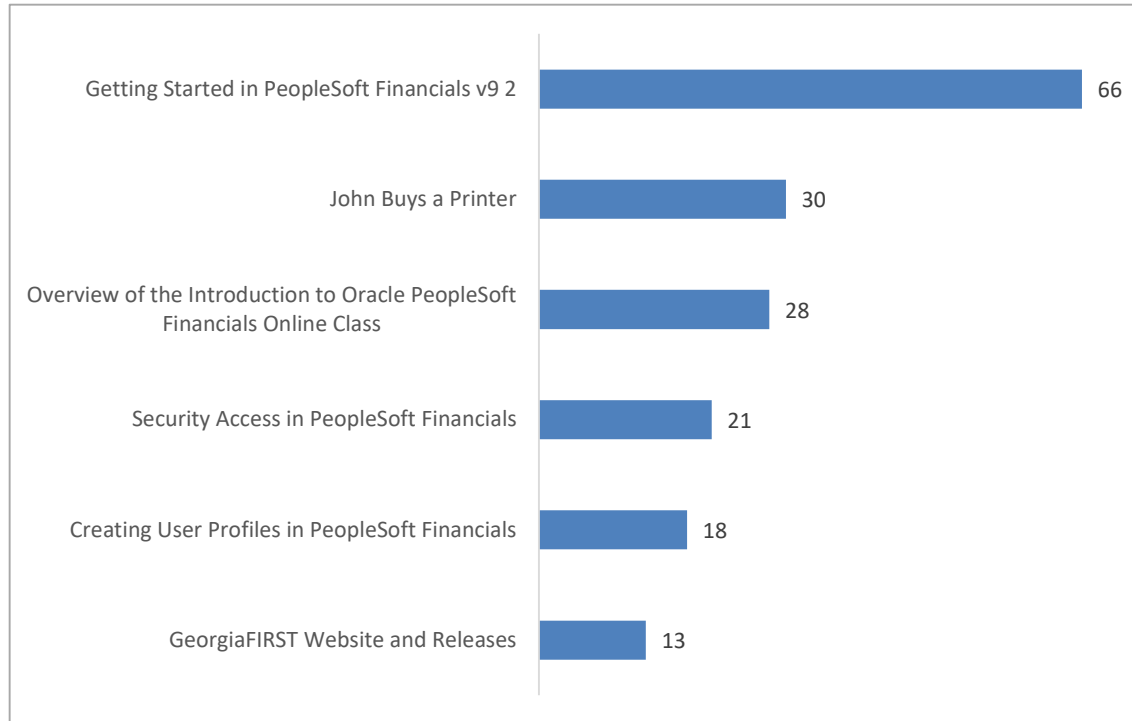
IV. Videos: What are users watching?

- 61 Videos
- 1796 Views
- 6448 Minutes

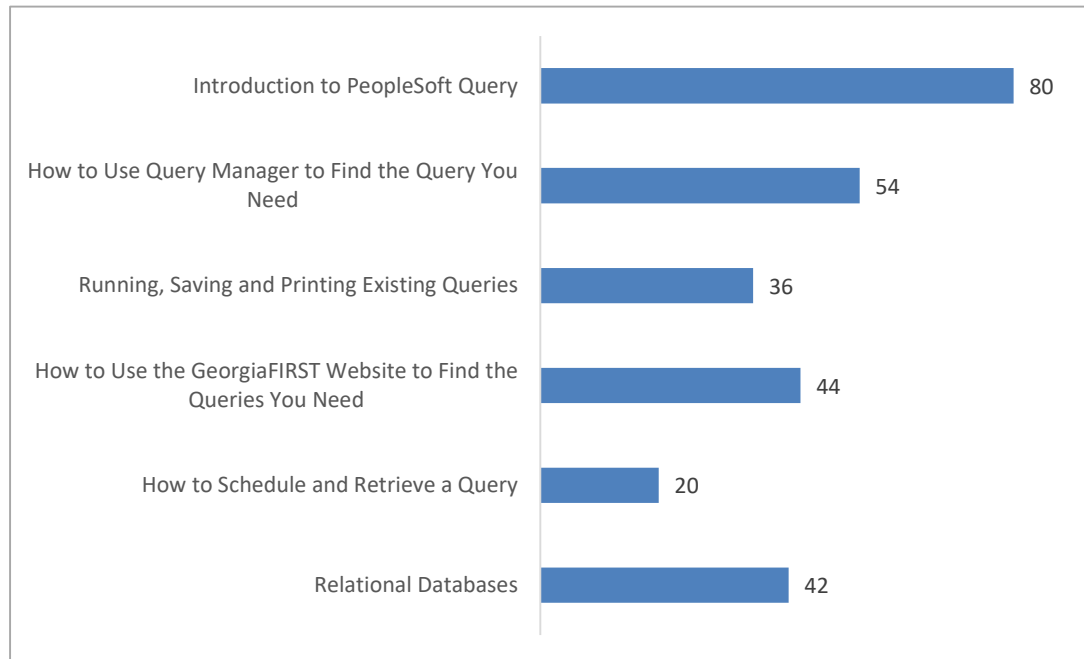


YouTube Videos

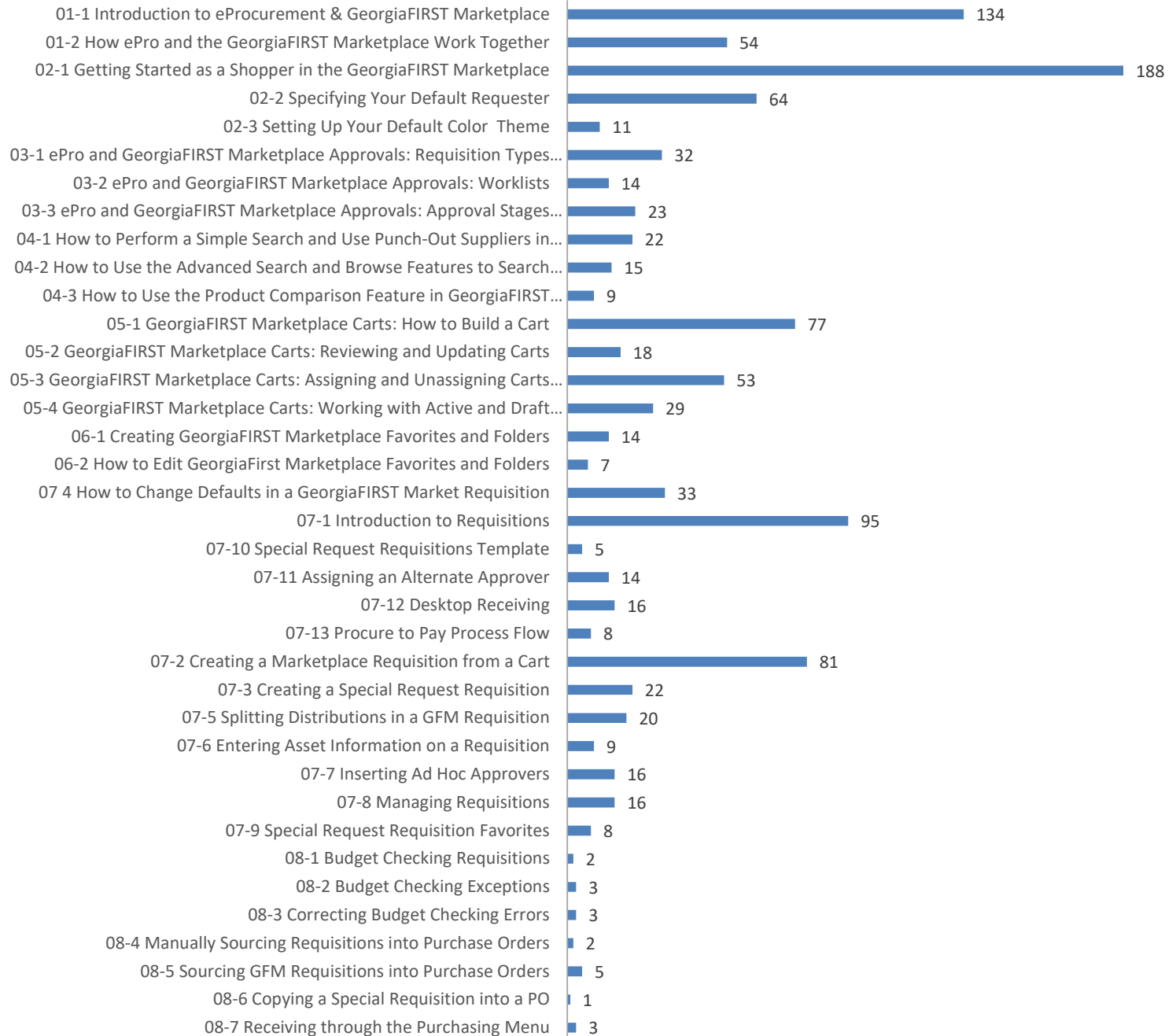
New User Resources



YouTube Videos Query Training



YouTube Videos eProcurement & GFM



Questions



Ongoing Survey Results

1. Query
2. eProcurement
3. Accounts Payable
4. Travel & Expenses



Our Reponse to User Needs

- Website redesign
- Updated or deleted documents
- New and updated videos
- Online classes—short, experiential



Roadmap for 2018



2018 Training Roadmap

- Query III: Creating Basic Queries (2017)
- AP Query Class
- Other module-specific query classes
- eProcurement and GFM (live, online)
 - shopper, requester, approver, buyer
- Travel & Expenses (videos)
- Continued Website redesign
- 2018 Training Survey
- Advertise what's available!



Questions



Karen Schwind
Communications and Training Professional
Administrative Services I Georgia *FIRST*
Karen.Schwind@usg.edu

