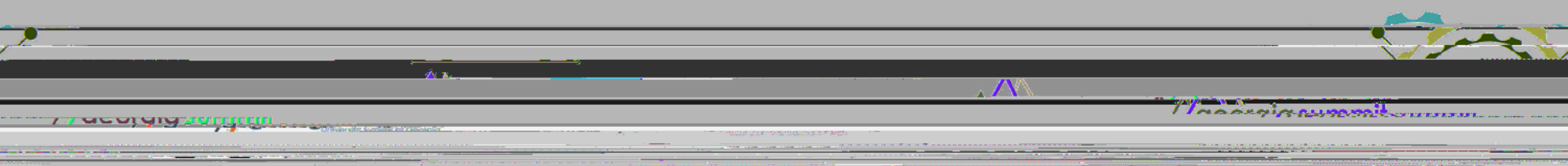# Georgia*FIRST* Year in Review and Roadmap Update

Donna Wooddell

Paige Born

Agenda

Note: Session Time adjustment: 5:10pm-5:50pm

- Financials Application Timeline
- Georgia*FIRST* by the Numbers
- Releases
- 2017 Annual Oracle Maintenance Release
- Update on Module Review Sessions
- Other Projects and Initiatives

Financials Application Timeline

Georgia*FIRST* by the Numbers
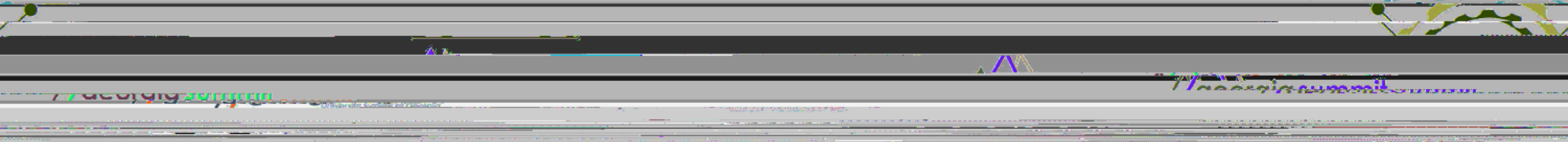
- Hosts **25** institutions in the consolidated PeopleSoft Financials environment
  - Five of these are consolidated institutions
- Supports **10** financial modules:
  - GL, Commitment Control, AR, ePro, PO, AP, AM, T&E, Budget Prep, Common Remitter
- During 2016, supported approximately **11,469** active users in PeopleSoft Financials

Georgia*FIRST*
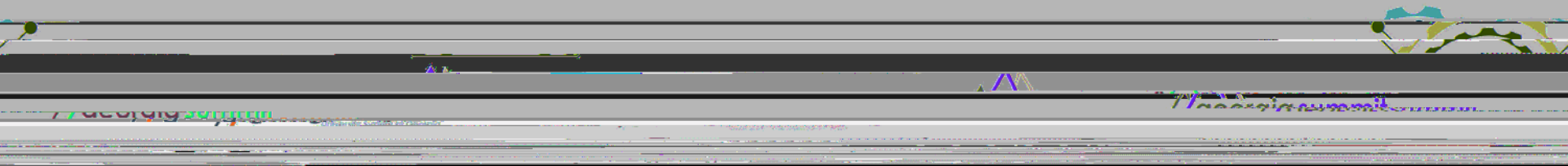
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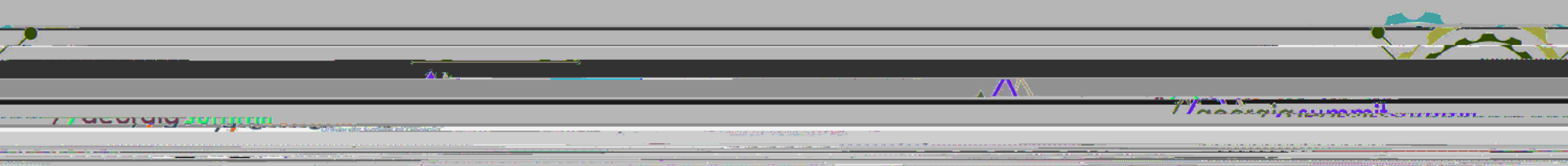
Financials Involvement - OneUSG Connect Project

- Georgia*FIRST* Financials support provided to OneUSG Connect project:
  - Functional resources:
    - Dedicated three resources at 75%+
  - Technical Resources:
    - Dedicated three resources at 75%+
- Resource forecasting:
  - Redirect resources back to Financials starting April, 2018

Financials Involvement - OneUSG Connect Project

- Impact to Financials Roadmap:
  - Rolling out of new Oracle functionality
  - Ability to develop project plan for implementing

RELEASES

Maintenance Strategy

- Oracle's PeopleSoft Selective Adoption
    -

2017 Annual Maintenance Release

- A testing project, not a technical project.
  - More than 3,000 system test scenarios to validate
- 2017 Scope:
  - Through PI 23
  - PeopleTools 8.55.17
- Apply, Evaluate, Retrofit
  - 60 retrofits included in 2017 Annual Maintenance Release

User Experience

- Single Sign-On
  -

User Experience

- PeopleSoft Fluid User Interface
  - Modern UI for all devices including tablets, smartphones and desktop.
  - Initial scope: Self-Service functionality.
- Fluid Homepage and Header
  - Tiles
  - Search - Elasticsearch
  - Notifications
  - Hamburger
  - NavBar

New Fluid Homepage

2017 Annual Maintenance Release

- URL change:
  - Practitioner: core.fprod.gafirst.usg.edu
  - Self Service: selfservice.fprod.gafirst.usg.edu

2017 Annual Maintenance Release

- New Department Manager Dashboard
  - Real time results rather than previous days data
  - Department-level security
  - Geared to non-traditional users
  - Drill down capability

  To learn more, attend session "Department Manager Dashboard" tomorrow @ 1:40pm

2017 Annual Maintenance Release

- New Department Manager Dashboard

2017 Annual Maintenance Release

- Implementing Supplier Workflow
  - Suppliers will need to be in an Approved (or Inactive) status prior to Release 5.30.
  - ITS will provide list to institutions in November.

  For more information, attend "ePro & Purchasing

2017 Annual Maintenance Release

- Timing of Annual Release:
  - Scheduled to apply Friday, December 1 to Sunday, December 3.
  -

2017 Annual Maintenance Release

- How to prepare:
  - Communicate system downtime
  - Change Management:
    - Prepare users for UI changes
      - ITS will provide a short YouTube video
    - Provide new URL
    - Download new Journal & Voucher spreadsheets
  - Plan for new features
    - Supplier Workflow setup
    - Department Manager Dashboard
    - Security Administration

2017 Annual Maintenance Release

- How to prepare:
  - Data Best Practice Recommendations:
    - Suppliers
      - Need to be in **Approved** or **Inactive** status
    - Workflow Approvals
      - Transactions should be in **Pending** or **Approved** status
      - Includes Travel Authorizations, Expense Reports, AP Vouchers, Journals, Requisitions, Purchase Orders

UPDATE ON MODULE ENHANCEMENT REVISESSIONS

Enhancements – Module Reviews

- Purpose of Module Enhancement Reviews
  - Review Oracle image fixes and new features.
  - Sessions allow sharing with institution process experts to obtain customer feedback and priority for implementing.
  - Depending on the implementation complexity (High, Medium, Low), USO Leader Team and/or USG Advisory Team approval required.

Enhancements – Module Reviews

- Outcome of Module Enhancement Reviews:
  - Institutions vote on their top three enhancement priorities
  - This provides user input so ITS is focused on highest priority needs of institutions.
  - The outcome is a roadmap for delivery of new enhancements.

Enhancements – Module Reviews

- MER Sessions completed:
  - ePro and Purchasing: April, 2016
  - Asset Management: November, 2016
  - Accounts Payable: November, 2016
  - Expense module: March, 2017

Enhancements – Module Reviews

- Priorities for ePro & Purchasing:

  1. Procurement Contracts/Contract & Sourcing Workbench

  2. Supplier 360

  3. Electronic Signature on Purchase Order

Enhancements – Module Reviews

- Status of Priorities for ePro & Purchasing:
    1. Procurement Contracts/Contract & Sourcing Workbench – In Progress
        - Meetings conducted with USO & DOAS representatives.
    2. Supplier 360 - On hold
        - Oracle issue has prevented delivery
    3. Electronic Signature on Purchase Order – In Progress
        - Development has started – deliver in 2018

Enhancements – Module Reviews

- Priorities for Asset Management:
  1. Transaction Reversal
  2. Physical Inventory
  3. Documentation and Training

Enhancements – Module Reviews

- Status of Priorities for Asset Management:
    1. Transaction Reversal - **Complete**
        - Implemented May 2017
    2. Physical Inventory – On hold
        - Due to change in AM support staff and other priorities
    3. Documentation and Training - Ongoing
        - Updated all AM Business Processes
        - New BP for Transaction Reversal
        - Monthly Checklist

Enhancements – Module Reviews

- Priorities for Accounts Payable:
    1. Documentation and Training
    2. Voucher Batch Approval (submit for approval)
    3. Payment Requests

Enhancements – Module Reviews

- Status of Priorities for Accounts Payable:

  1. Documentation and Training - Ongoing

     - AP Query training, etc.

  2. Voucher Batch Approval (submit for approval) - **Complete**

     - Implemented April 2017

  3. Payment Requests – In Progress

     - Tentatively planning to deliver Spring 2018

Enhancements – Module Reviews

Enhancements – Module Reviews

- Additional Enhancements for Accounts Payable:

    4. Audit Logging - **Complete**

        - Provides a Financial audit trail that captures User ID and date/time of individual performing action.

        - Turned on for Payment Cancellations 4/24/2017.

        - Currently, only ITS Support has access to the audit logs. Users can request this information.

        - ITS will be looking at turning this on for other modules (Journals, Assets, etc.).

Enhancements – Module Reviews

- Priorities for Travel & Expenses module:
  1. Risk Templates
  2. Training and Documentation
  3. Attachment capability for Approvers

Enhancements – Module Reviews

-

Enhancements – Module Reviews

- Additional Enhancements for Travel & Expenses:

  4. Configuration Cleanup for Expense Types – Complete

     - During MER session, existing values were reviewed and users provided input on changes needed.

     - This cleanup will make for a more user friendly experience and includes items like:

       – Removal of required fields that are no longer necessary.

       – Improved Expense Type Descriptions

     - Changes made in production 5/22/2017.

OTHER PROJECTS & INITIATIVE

Institutional Consolidations

- July 1, 2017:
  - Albany State University and Darton State College = new Albany State University

- July 1, 2018:
  - Georgia Southern University + Armstrong State University = New Georgia Southern University
 - ABAC + Bainbridge College = New ABAC

Budget Amendment Functionality

- New Budget Amendment Functionality:
    - Plan to begin development following Budget Prep redesign system and user acceptance testing.
    - Goal is to deliver for institutional use beginning July 1, 2018 for FY2019 budgets.
    - Our first priority is support of OneUSG so this will be dependent on functional and technical resource availability.

OneUSG Connect & Financials Integration

- ## Financials Integration
  - Significant changes in how data syncs to Financials.
  - Personal data no longer nightly feed, feeds over throughout the day.
- ## Common Remitter and Benefits Recon
  - Changing January 2018 for Cohort 1 & 2 institutions
    - Access through OneUSG Connect
  - Will remain in Financials for institutions in cohort 3 until go-live.
- ## OneUSG "Blackout" dates for Cohort 1 institutions
  - In December *(schedule still being finalized)*
  - We will need to evaluate impact to personal data changes, etc.
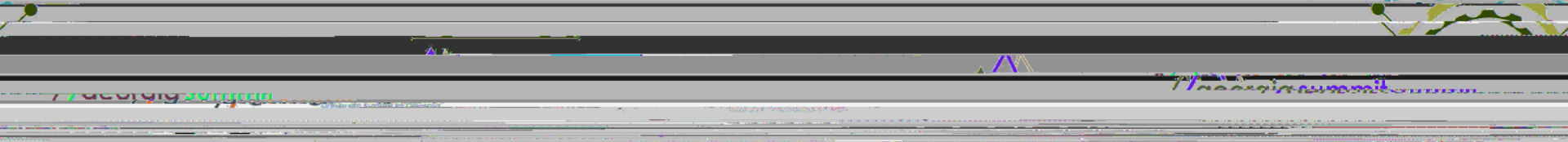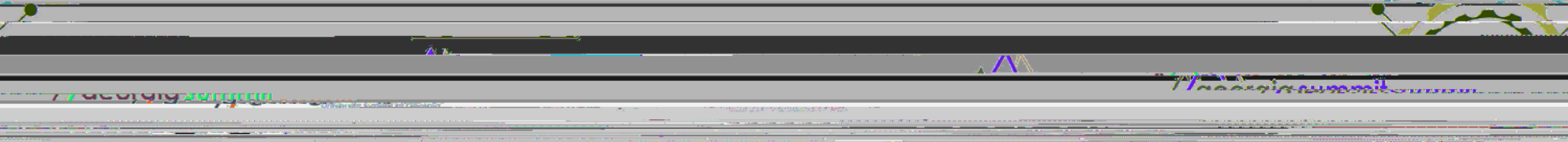
ePro/GFM Implementation Update

- eProcurement & Georgia*FIRST* Marketplace (GFM)
  - 21 Institutions are using ePro
  - 18 of these also use GFM
    - 2 - institutions went live on GFM this year
    - 2 - in process of implementing GFM

Travel & Expense Implementation Update

- PeopleSoft Travel & Expense Module
  - Currently 17 Georgia*FIRST* institutions are using T&E
  - Continued emphasis on improving user experience
    - July 2016 - Configuration change made to turn off budget check for Travel Authorizations (hanging encumbrance issues)
    - December 2016 - Daily one line Meal Per Diem added to streamline meal entry
    - May/June 2017 - Additional improvements identified in module review sessions
    - December 2017 – Fluid User Interface (mobile)

Questions