Georgia*FIRST* Financials Update

A Framework for Tomorrow

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Administrative Services

Information Technology Services

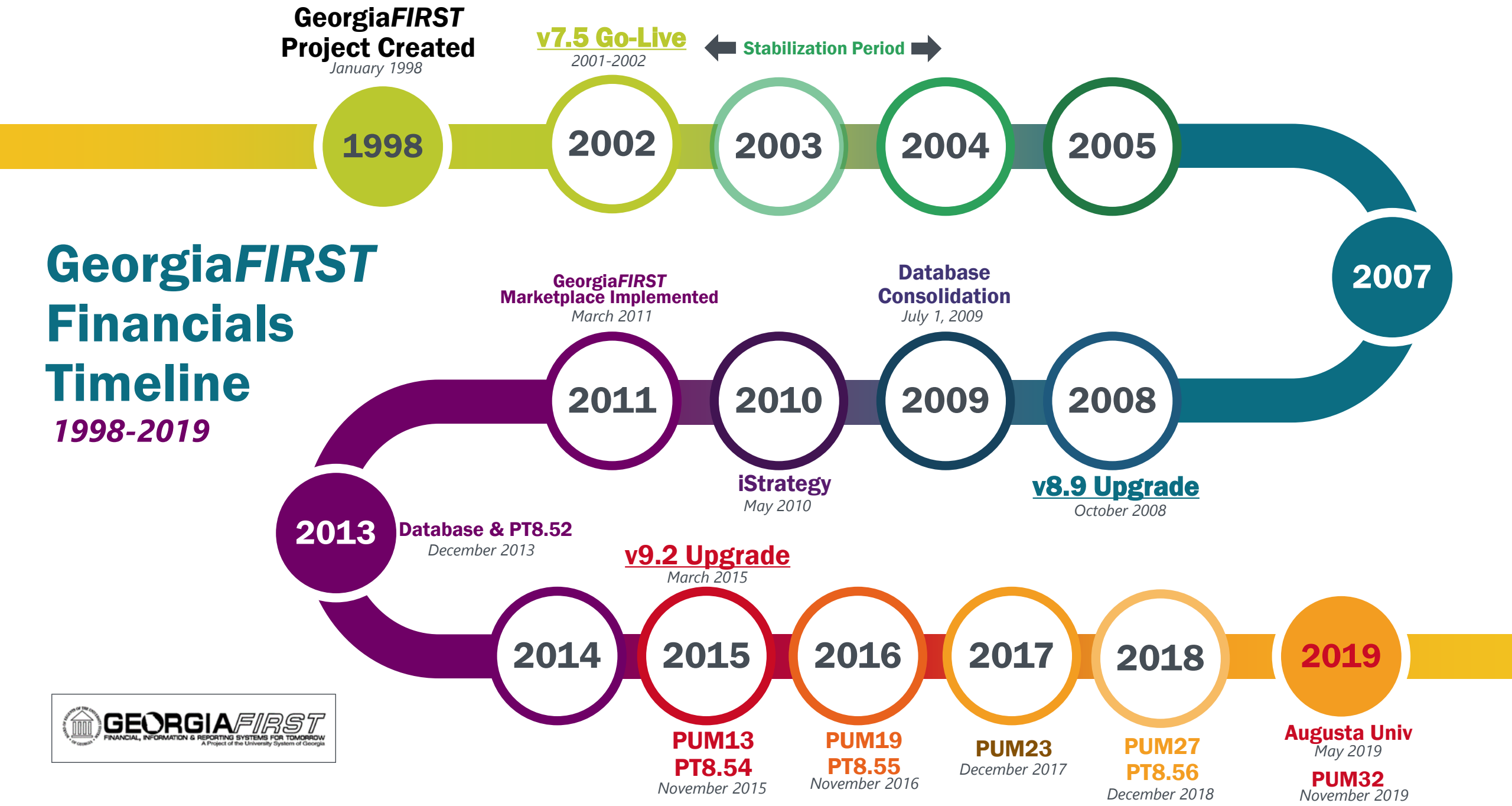
interactUSG

Agenda

- Georgia*FIRST* Financials Timeline and Accomplishments
- Administrative Support Updates
- Annual Oracle Maintenance Release
- User Acceptance Testing
- Georgia*FIRST* Financials Roadmap

GeorgiaFIRST Financials Timeline

1998-2019

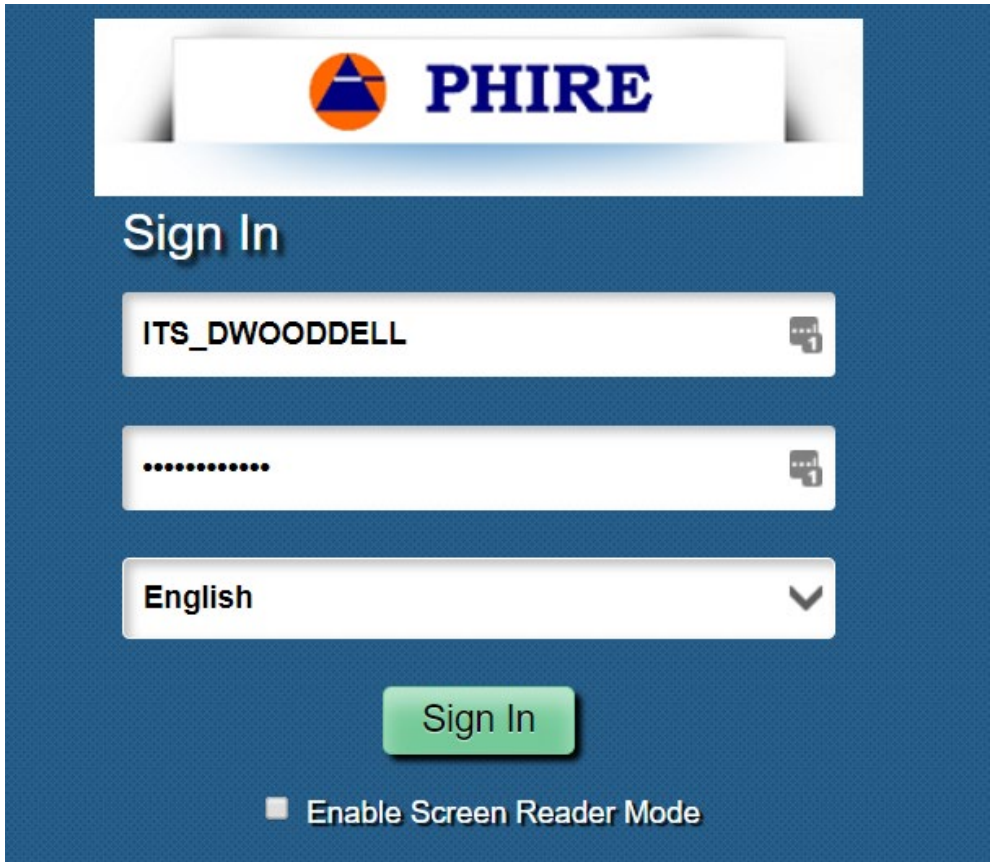


GEORGIAFIRST
FINANCIAL INFORMATION & REPORTING SYSTEMS FOR TOMORROW
A Project of the University System of Georgia

Application Change Management Solution

- Phire is a software that helps organizations better manage and control application changes
  - Workflow Driven Change Request Tracking
  - PeopleTools Object Versioning and Migrations

- Phased Implementation
  - Currently using for DBI (SQL updates)
  - Next Ad hoc Releases



Augusta University Financials

- Transitioned Hosting and Support of Augusta Financials from Cerner to ITS Georgia*FIRST* Financials team
  - Project Referred to as “Lift and Shift”
  - Go-live was May 30, 2019
- This is a separate Financials database
- ITS provides same level of support as Georgia*FIRST* (releases, Helpdesk support, maintenance, etc.)

Augusta University Financials

- Next Steps
  - Work towards aligning Augusta and Georgia*FIRST* model
    - Latest version of Georgia*FIRST* releases
    - Same Oracle PUM level

- Future State
  - Goal of creating a single “Best in Breed” Financials application
  - Implement new modules (Grants Suite)

Department Manager Dashboard

- Enhancements
  - Top Supplier Dashboard – December 2018
  - PO Open Encumbrance Dashboard – November 2019

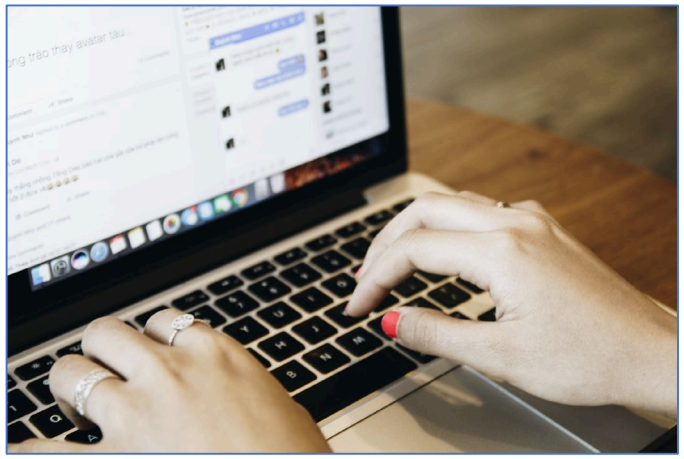
- iStrategy decommissioned – August 2019

HEUG
Higher Education User Group

- HEUG is a central place for institutions to access and share information
  - USG has purchased a System Wide License
  - Provides opportunity to present at annual Alliance Conference
  - Registration Discounts
  - Free participation in online training

Administrative Support Updates

Communications



Documentation

Training

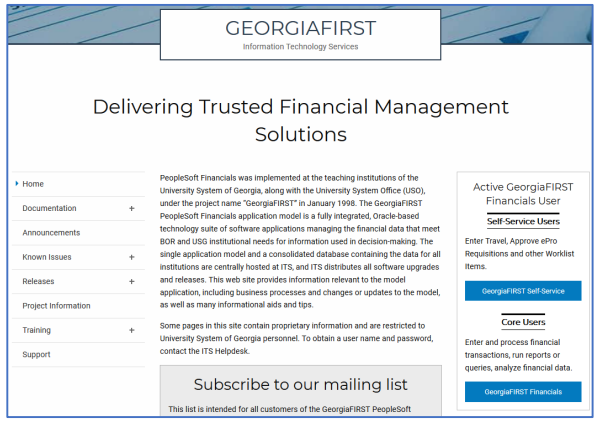
Where Are We Now? - Communications

- To manage content, design, and deliver information to effectively engage with the Georgia*FIRST* audience

- Three Communication Channels:

Mailchimp

Listservs

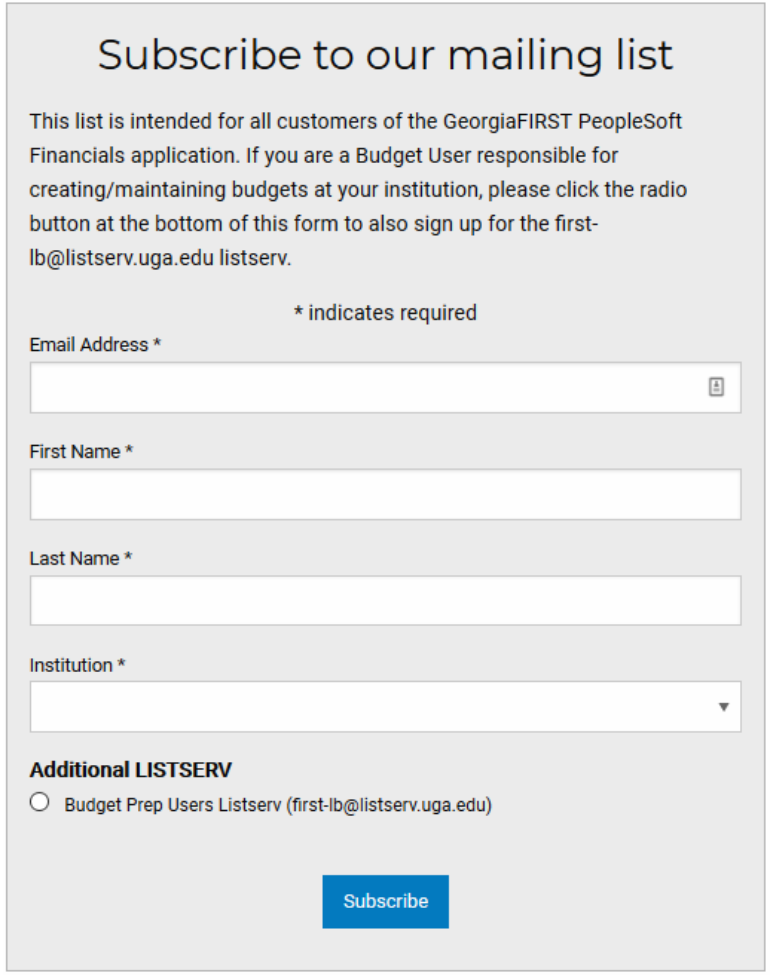


GeorgiaFIRST Website

Where Are We Now? - Communications

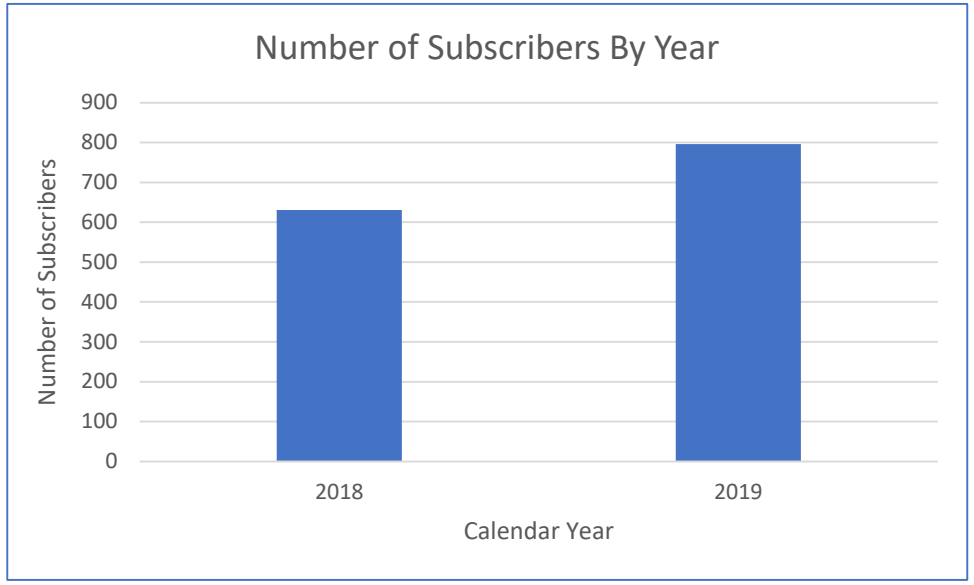
How to Subscribe

1. Go to GeorgiaFIRST Website
2. Fill out form as seen on the right

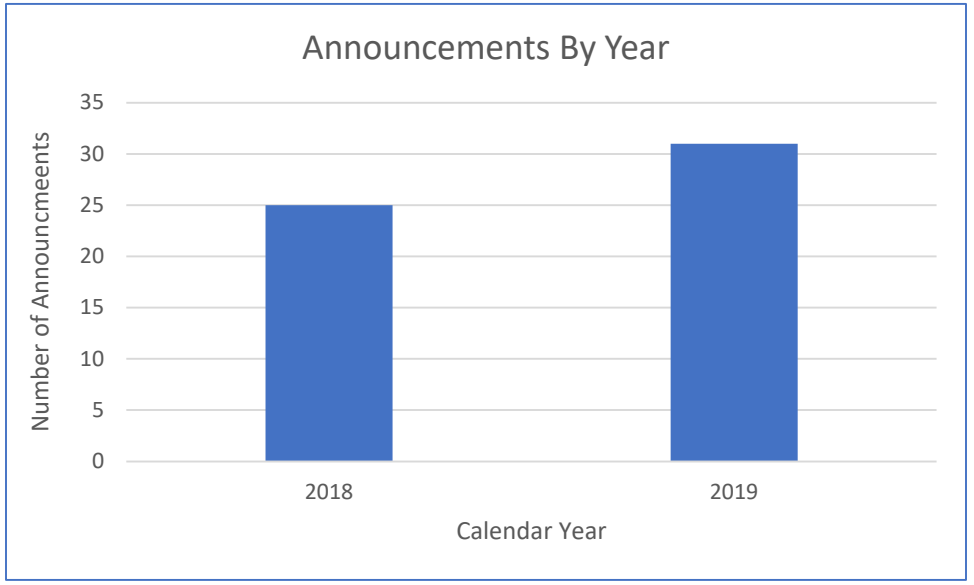


Where Are We Now? - Communications

- By the Numbers



26% increase



24% increase

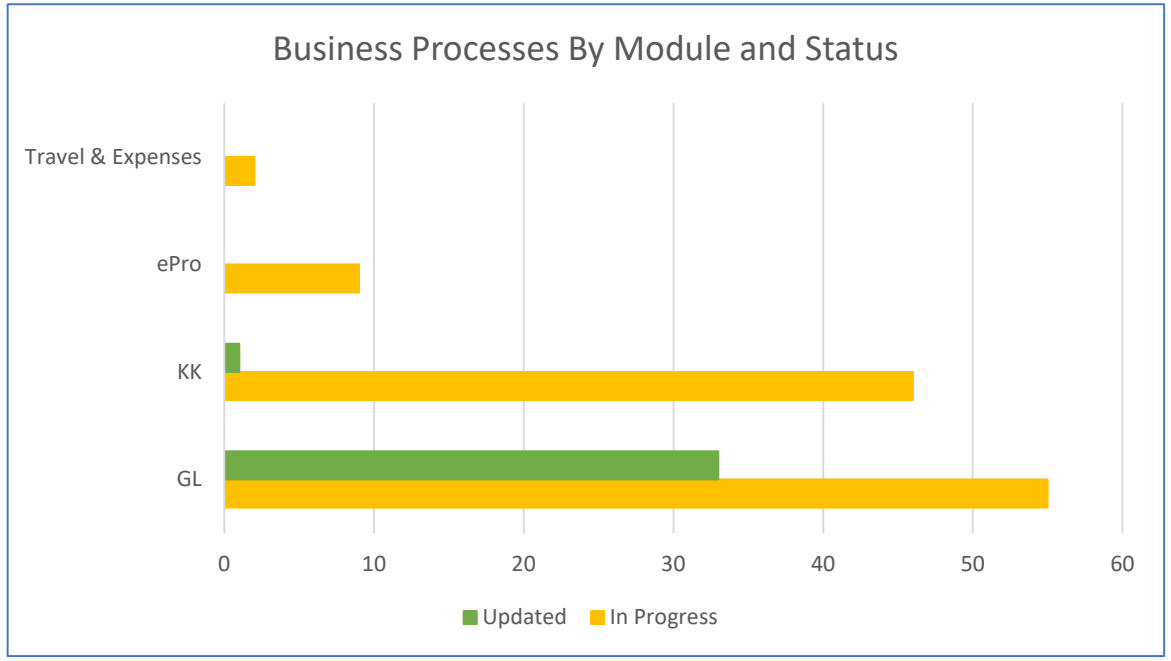
Where Are We Now? - Documentation

- To link concepts, processes, and technologies together to better understand how to use Georgia*FIRST* Financials

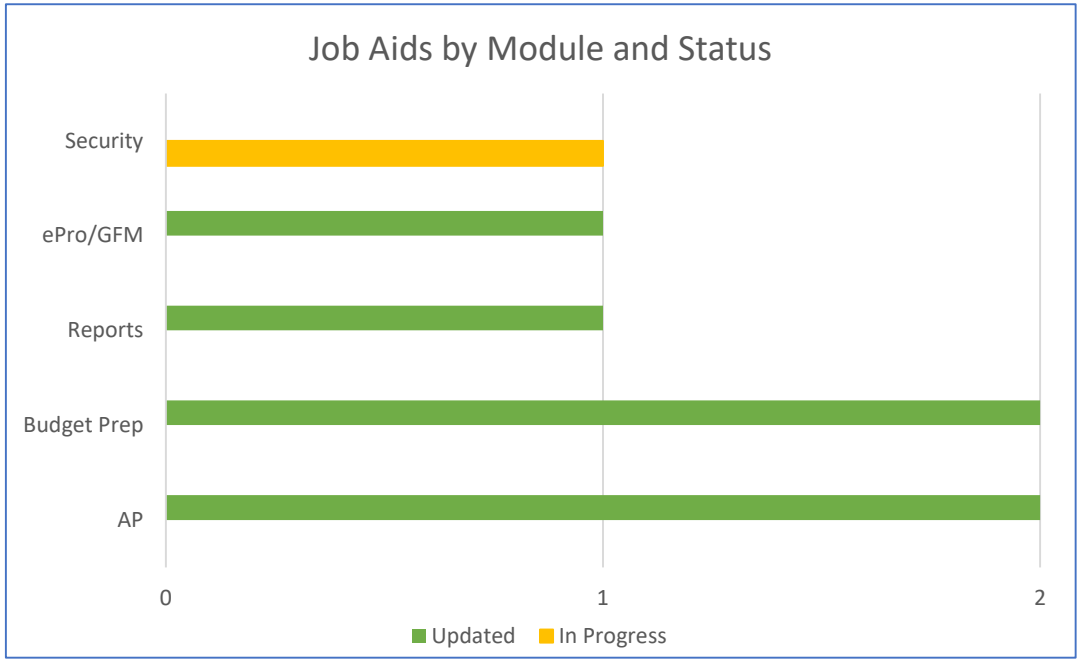
- Georgia*FIRST* Website:
  - User Guides
  - Business Processes
  - Job Aids
  - Presentations
  - Training Resources

Where Are We Now? - Documentation

By the Numbers



112 Business Processes



7 Job Aids

Where Are We Now? - Training

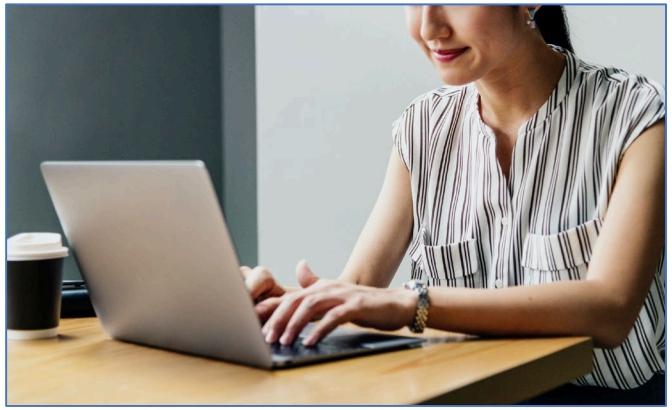
- To expedite knowledge, skill, and abilities required for effective job performance

- Two Primary Resources:
  - Georgia*FIRST* Website
  - GeorgiaVIEW Online Training
    - Certificates Available via the GeorgiaVIEW platform

Where Are We Now? - Training

By the Numbers

72 Videos

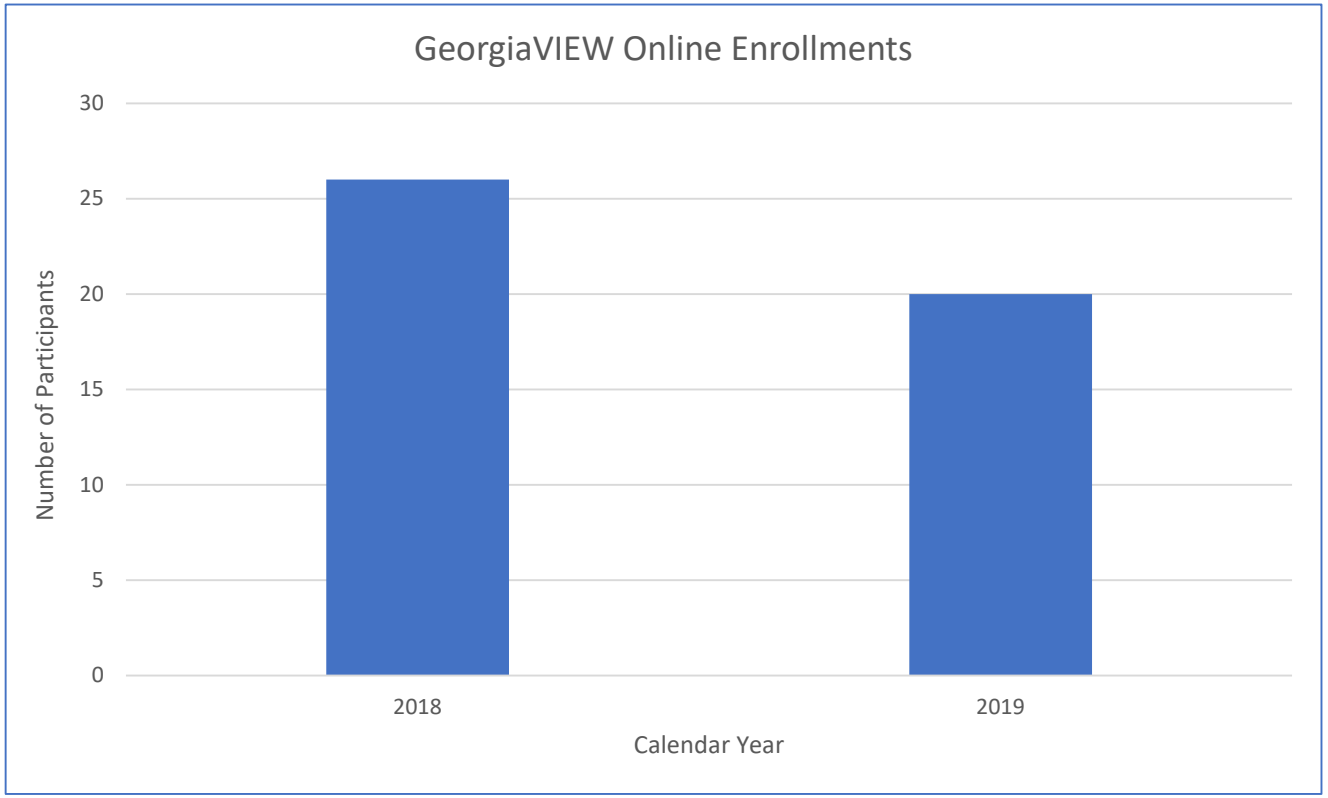


11 Online Courses

Enrolled Participants
in
120 Courses

Where Are We Now? - Training

By the Numbers



Where Are We Now? - Training

NASBA Accreditation Update

- GeorgiaVIEW Online Training not an official part of NASBA accreditation
- Can use the online training for NASBA CEU's
- Users are responsible for calculating and reporting CEU's to NASBA

Where Are We Going?

Where Are We Going? - Communications

- Communications
  - Be informative, concise, and consistent
  - Use Mailchimp as our primary channel
  - Use GeorgiaFIRST website as our on-demand source
  - Update usernames and passwords to access the Chart of Accounts and Fiscal Year-End page on the website

Where Are We Going? - Documentation

2019	2020		
November	**January - May**	**July**	**December**
• Updated General Ledger Business Processes • Updated Commitment Control Business Processes	• Updated User Guides	• Updated ePro Business Processes	• Updated Travel & Expenses Business Processes

Where Are We Going? – Training

- Define what constitutes a beginner, intermediate, and expert level user to make sure we use a shared definition
- Assess current training provided by institutions and begin to offer training to fill in the gaps
- Create recommended training paths with Georgia*FIRST* materials
- Produce more foundational training materials like a glossary of terms for each module
- Update GeorgiaVIEW online course content

Next Steps

- Gather feedback
  - Needs Assessment
  - Contact Me Directly: asheley.faris@usg.edu or ITS Helpdesk ticket

Resources

- GeorgiaFIRST Website
- GeorgiaVIEW Training
- ePro/GeorgiaFIRST Marketplace Training
- GeorgiaFIRST Documentation
- GeorgiaFIRST Announcements
- GeorgiaFIRST Known Issues
- GeorgiaFIRST Releases

Annual Oracle Maintenance Release

Annual Oracle Maintenance Release 2019

- Release Number
  - FREL5.50
- Database Upgrade
  - 12c to 12.2
- PeopleSoft Update Images (PUM)
  - 9.2.028 through 9.2.032
- PeopleTools Patches
  - 8.56.20
- **System Downtime**:
  - Begins 5:00 p.m. Thursday, November 21, 2019
  - Available 7:00 a.m. Monday, November 25, 2019

Annual Oracle Maintenance Release 2019

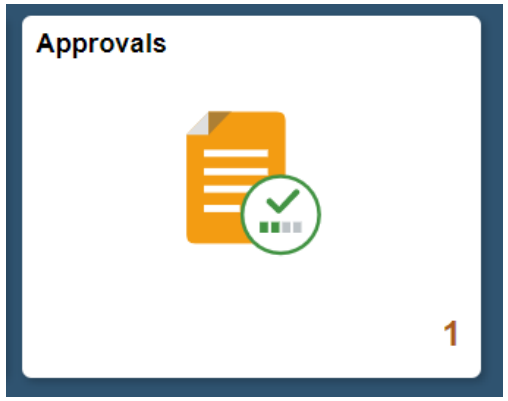
- Objectives:
  - More intuitive user experience
    - New Home Pages
    - New Tiles
  - Performance Improvements
  - New Functionality
  - Internal Control Features
- Currently performing system testing
  - Still in a state of learning and discovery

Annual Oracle Maintenance Release 2019

- New Home Pages
  - Finance & Accounting
  - Payables
  - ePro/Purchasing
- Home Page grouped by job function
- A default Home Page can be set

Annual Oracle Maintenance Release 2019

- New Tiles
  - Approvals Tile
    - All transaction types
  - eProcurement Tile
  - Security WorkCenter Dashboard

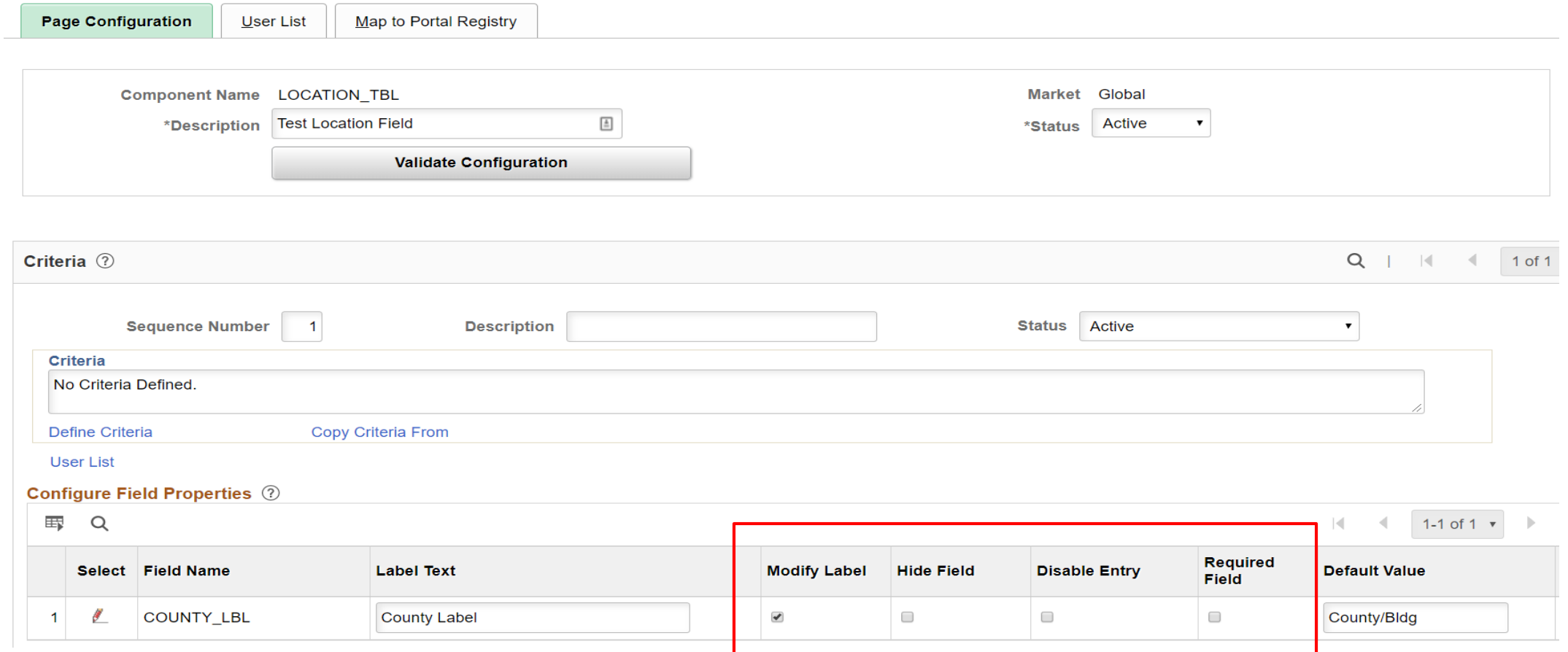


Performance Improvements

- Travel and Expenses
  - Modify Approved Transactions page
  - Travel Authorization Delete page
  - Post Liabilities and Close Liabilities page
  - Send Back of Transaction

Annual Oracle Maintenance Release 2019

- New Functionality
  - Page and Field Configurator will replace page mods

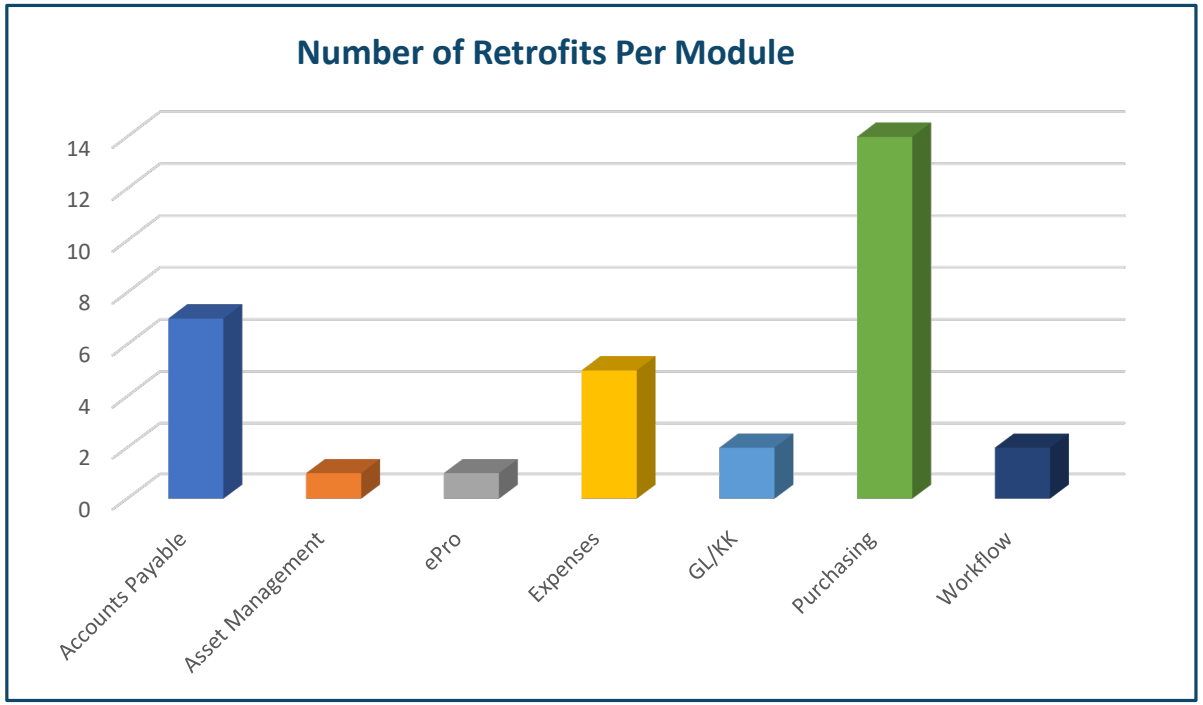


Annual Oracle Maintenance Release 2019

- Internal Control Features
  - Adding audit record to capture who opens accounting periods and when (to PS_FIN_OPEN_PERIOD)
  - Turning on audit functionality to capture Supplier changes for internal audit (addresses, bank account changes, etc.)
  - ITS Support and Share Access Accounts to use Single Sign on/Multi-factor authentication
    - Includes USO employees, DOAA user accounts, etc.

Annual Oracle Maintenance Release 2019

- Retrofits
  - 32 BOR mods impacted by Oracle images
    - PO Print
    - ePro/GFM Integration
    - BOR AP Check Print templates

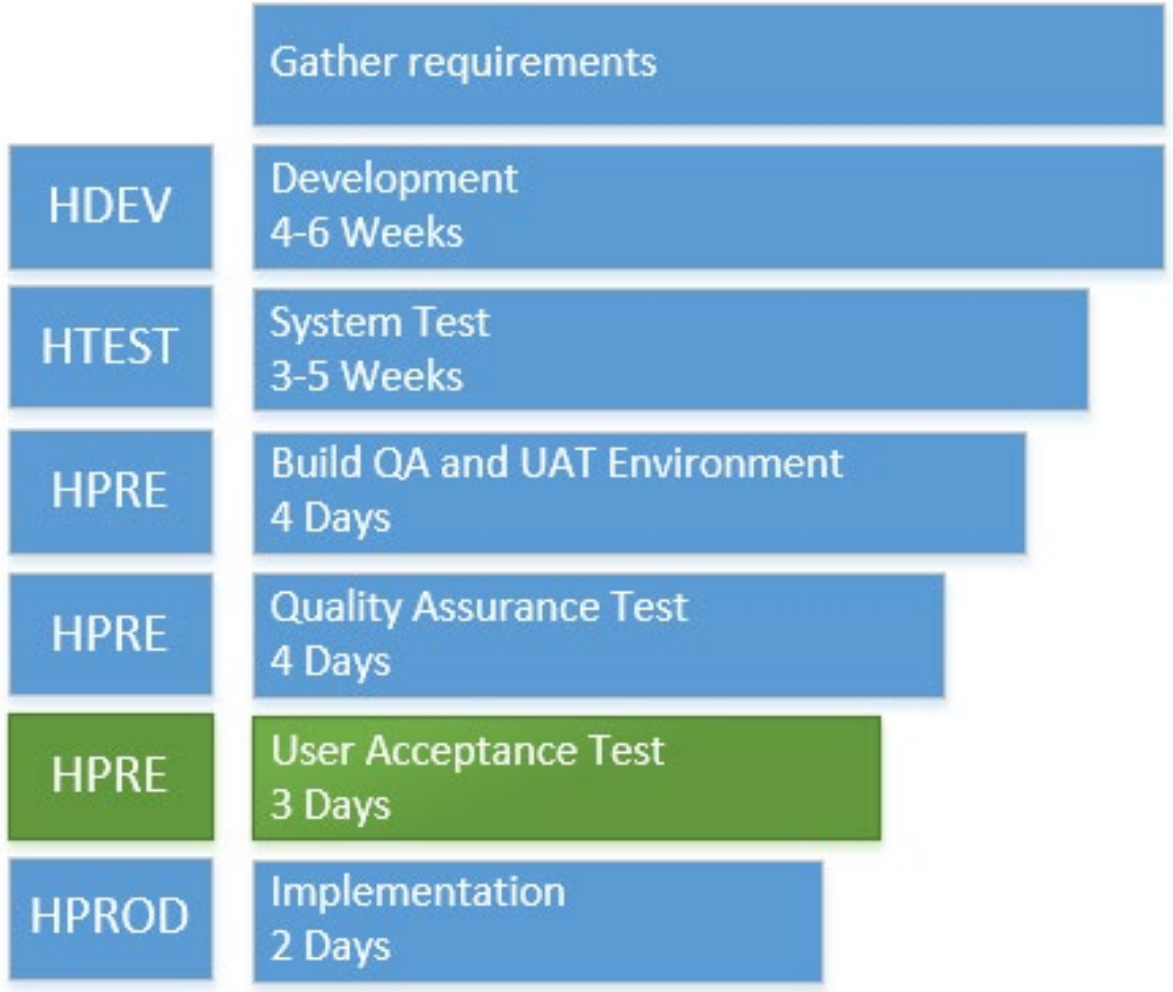


Annual Oracle Maintenance Release 2019

- Additional Release Items
  - Budget Prep updates
    - Most were identified during 2020 budget cycle
  - New page to upload PO signatures
    - When a PO is dispatched, the signature will be added to the PO
  - Changes to various reports and queries

User Acceptance Testing

User Acceptance Testing



In addition to Quality Assurance Testing, User Acceptance Testing will be added to all releases.

Financials Release and User Acceptance Test Dates

Release Date	User Acceptance Test Dates	Release Number	Description
1/17/2020	1/14-16/2020	5.52	1099 and Budget Prep
3/13/2020	3/10-12/2020	5.54	Enhancements and Fixes
5/15/2020	5/12-14/2020	5.56	Fiscal Year End

For information on releases, visit the Georgia*FIRST* Releases page.

Model Change Requests

- Turn on Auditing for User Security Changes in Georgia*FIRST* Financials
  - Approved by Change Review Board
  - New tool for Security Administrators
  - Track role and user preference changes for internal audit purposes
  - Query on new audit records to validate changes
    - Who made the change
    - Date time stamp of changes
  - Plan to deliver in November 2019 or March 2020
- Another MCR from UWG In Process of Being Submitted to Change Review Board for Approval

Georgia *FIRST* Financials Roadmap

Administrative Services – Georgia *FIRST* Financials

2019 | **2020**

July - December	January - March	April - June	July - December
Annual Maintenance Release 5.50	**Release 5.52**	**Release 5.54**	**Release 5.56**	**Fiscal Year-End**	**Stay Current**
• Budget Prep Enhancements • PeopleTools patch (8.56.20) • Critical Patch Updates • Oracle PUMs (28 – 32) • Database Upgrade (12.2)	1099-MISC Updates	Final Budget Prep Enhancements	• Fiscal Year-End • Budget Amendment	Year-End Support	• Oracle Annual Maintenance • PeopleTools Upgrade

Program Enhancements, Regulatory Requirements, Audit and Program Support

Administrative Services – Augusta University Financials

2019

October - December

Release 1.10

- Critical Patch Updates
- PeopleTools Patch (8.56.18)
- Multi-Factor Authentication

2020

January

Release 1.20

- 1099-MISC
- Budget Prep

March

Annual Maintenance Release 1.22

- PeopleTools patch (8.56.22)
- Oracle PUMs (25 – 32)
- BOR Alignment

May

Release 1.24

- Fiscal Year End
- Budget Amendment

Program Enhancements, Regulatory Requirements, Audit and Program Support

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Budget Prep Timeline

Application Release	Description	Production Date
Georgia*FIRST* Financials	Fixes and enhancements	November 2019
Augusta University Financials	Retrofits and enhancements	January 2020
All OneUSG Institutions	Budget Prep Load	March 2020
	Budget Amendment	**May 2020 (tentative)**

Archiving PERS_SERV_BOR (PSB)

- Due to the large volume of data published to PERS_SERV_BOR within OneUSG and Financials, we need an archiving strategy

OneUSG Connect/HPROD		GaFIRST/FPROD		Augusta/AUFPROD	
EXTRACT(YEARFROMRUN_DT)	COUNT(*)	EXTRACT(YEARFROMRUN_DT)	COUNT(*)	EXTRACT(YEARFROMRUN_DT)	COUNT(*)
				2008	38,395
				2009	1,767,604
		2010	13,143,074	2010	1,842,835
2011	365,293	2011	15,034,635	2011	1,688,518
2012	368,455	2012	15,992,298	2012	2,035,295
2013	381,439	2013	16,395,054	2013	1,832,740
2014	420,838	2014	16,811,319	2014	1,927,445
2015	459,562	2015	17,013,457	2015	2,282,460
2016	379,479	2016	16,703,275	2016	1,864,345
2017	3,187,220	2017	18,902,767	2017	1,922,219
2018	32,401,636	2018	36,915,300	2018	2,982,302
2019	37,958,193	2019	23,556,473	2019	3,165,460
	75,922,115		190,467,652		23,349,618

PSB row counts as of 8/01/19

Archiving PERS_SERV_BOR (PSB)

Application	Archiving Strategy
OneUSG Connect	Retain current + one previous year
Georgia*FIRST* Financials	Retain current + one previous year

- Additional Considerations:
  - Approach will allow PSB tables will remain in sync (HCM and PSFIN)
  - Will have query access to history/archive tables
  - Non-Georgia*FIRST* Financials institutions need to adopt their own archiving strategy

Questions