



**PeopleSoft Financials Project Team
Status Meeting**



October 16, 2008

AGENDA



- **Introduction**
- **Communication Strategy**
- **Business Process Documentation**
- **Procure to Pay Process**
- **Scope Decisions**
- **Detail Timeline**
- **Questions**

PeopleSoft Upgrade 9.0

New to the Team

Project Manager – Larissa Goldberg

Developer – Alfredo Hernandez

Developer – Christina Arocha

Junior Business Analyst – Argerie Matute

Junior Business Analyst – Evelyn Gutierrez

General Ledger \ Commitment Control Consultant – Sean O'Mahoney

DSO Consultant – Mark Tabor

PeopleSoft Upgrade 9.0
Communication Strategy

Goal: Create awareness and keep the university community informed of the project for both Grants Implementation and Financials Upgrade

WHO

Key university stakeholders include Executive, Deans, Faculty Administrative staff and Project Team

HOW

Various tools will be used as communication vehicles including meetings, website, newsletters and personnel

WHEN

Frequency dependent on the target audience and ranges from weekly to monthly

PeopleSoft Upgrade 9.0 Communication Strategy Matrix

	General Target Audience	Communication Vehicle	Frequency
Executive	Board of Trustees	Meeting	Quarterly
	Operations Committee	Meeting	Quarterly
Deans	Deans Advisory Council	Meeting	Jan '09/June '09
	CADS - Council of Asst./Assoc. Deans	Meeting	June '09
	G 51	Meeting	May/June '09
Faculty	Faculty Senate Technology Committee	Meeting	Quarterly
	Research Council Group	Meeting	Monthly
	Faculty Senate	Meeting	May/June '09
Administrative	ITA Committee - Information Technology Administrators	Meeting	Quarterly
	UTS Customer Care Team	Meeting	Biweekly
	Faculty/ Staff at Large	Newsletters, Flyers, Email, posters, yard signs	Various
	Budget Managers/Communication Partners	Meeting	Monthly
Project Team	PantherSoft Steering Committee	Meeting	Ongoing
	Financials Project Team	Meeting	Biweekly
	Grants Project Team	Meeting	Biweekly

PeopleSoft Upgrade 9.0

Business Process Documentation

- ✓ Processes to be documented
 - All business process revolving around Peoplesoft
 - Dedicated OPS support assigned
 - Includes current process and changes after implementation

- ✓ Use of User Productivity Kit
 - Peoplesoft product used for training and process documentation
 - Test site available
<http://panthersoft.fiu.edu/financials/onlinetraining.htm>

PeopleSoft Upgrade 9.0

Procure to Pay

All methods used to acquire and pay for goods and services within the University



Track and Review

- Members of University community “customer”
- Authorized “requisitioner”
- Purchasing Card
- Purchase Orders
- Unencumbered purchases
- Travel Authorization and Expense Reimbursement

Servicing Departments: Accounts Payable, Purchasing, Travel

PeopleSoft Upgrade 9.0

Modules Update

- ✓ Completing Fit/Gap
 - Fit/Gap documents presented
 - Fit/Gap approvals

- ✓ Financials Modules Status
 - GL and Commitment Control
 - Asset Management
 - Procure to Pay
 - Purchasing
 - Accounts Payables
 - Travel & Expenses
 - DSOs

PeopleSoft Upgrade 9.0

Scope Decisions

- ✓ Construction Projects
 - Implementation in Phase I
 - Billing process analysis pending

- ✓ Scope items needing further review and analysis
 - Faculty Practice Plan (FIU06)
 - Encumbrance Release
 - ADP Interfaces
 - Procard vs. Credit Card process
 - Enterprise Security process
 - Workflow Administration

PeopleSoft Upgrade 9.0 Phase I Timeline

FY 2008-09

Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----

Planning

Fit-Gap

Design

Configuration

Build

Testing Phases

TRAIN

Go Live

July 20

Production Support

PeopleSoft Upgrade 9.0

Detail Timeline

- ✓ **To be completed by the end October 2008**
 - Complete Fit/Gap Sessions
 - Deliver results via Fit/Gap documents
 - Obtain FIU business approval for Fit/Gap documents

- ✓ **To start in the beginning of November 2008**
 - Begin Design Sessions (FIU & Consulting partner)
 - Design processes to account for 'gaps' in the delivered functionality
 - Improve existing processes
 - Introduce new release features to functional users

- ✓ **To start in the beginning of December 2008**
 - Begin Reporting analysis
 - Initial preparations to execute communication strategy

- ✓ **Technical tasks - taking place currently**
 - Begin analysis and retrofitting of customizations
 - Preparation of various 9.0 environments

Questions?

