



FLORIDA INTERNATIONAL UNIVERSITY

PeopleSoft v.9.0 Grants Implementation Kickoff

August 12, 2008



Agenda

- Introductions
- Message from Executive Sponsor
- Project Overview
- Project Activities & Deliverables
- PeopleSoft Grants Considerations
- PeopleSoft Grants Demo

Introductions

Message from Executive Sponsor

Project Overview

University Initiatives

- Upgrade all existing PS Financials modules and Business Units to v.9.0
- Implement the PS Grant Suite for the Office of Sponsored Research & Administration
- Implement PS Financials for FIU Foundation, Inc.
- Proposed go-live date is July 20, 2009

High Level Overview

- Objectives
 - Implement PeopleSoft Grants v. 9.0
 - Focus on key business processes (see separate slide)
- Duration and Schedule
 - 12 months
 - July - August 2009
- Implementation Considerations
 - Solves most urgent and critical needs
 - Allows for manageable project risk and early success
 - Gain experience with product that we can build on


Business Process Inventory

- Maintain Grants Profiles
 - Institution
 - Department
 - Professionals
 - Sponsors
 - Sub-Recipients
- Create Proposal
 - Create Proposal
 - Create Proposal Budget
 - Submit Proposal
- Create Award
 - Generate Award
 - Setup Award
 - Setup Contract
 - Setup Project and Activity
- Budget and Track Grants Spending
 - Setup Budget
 - Modify Budget
 - Enter & Track 3rd Party Cost Share
- Facilities & Administration
- Cost Sharing
- Revenue Recognition
- Generate Bills
 - Cost Reimbursable
 - Letter of Credit
 - Advance
 - Fixed Fee
- Maintain Receivables
 - Deposit Entry
 - Cash Application
 - Receivables Maintenance
- Award Modifications
- Award Closeouts
- Non-Sponsored Projects
- Grants Suite Recon

Implementation Phases & Deliverables

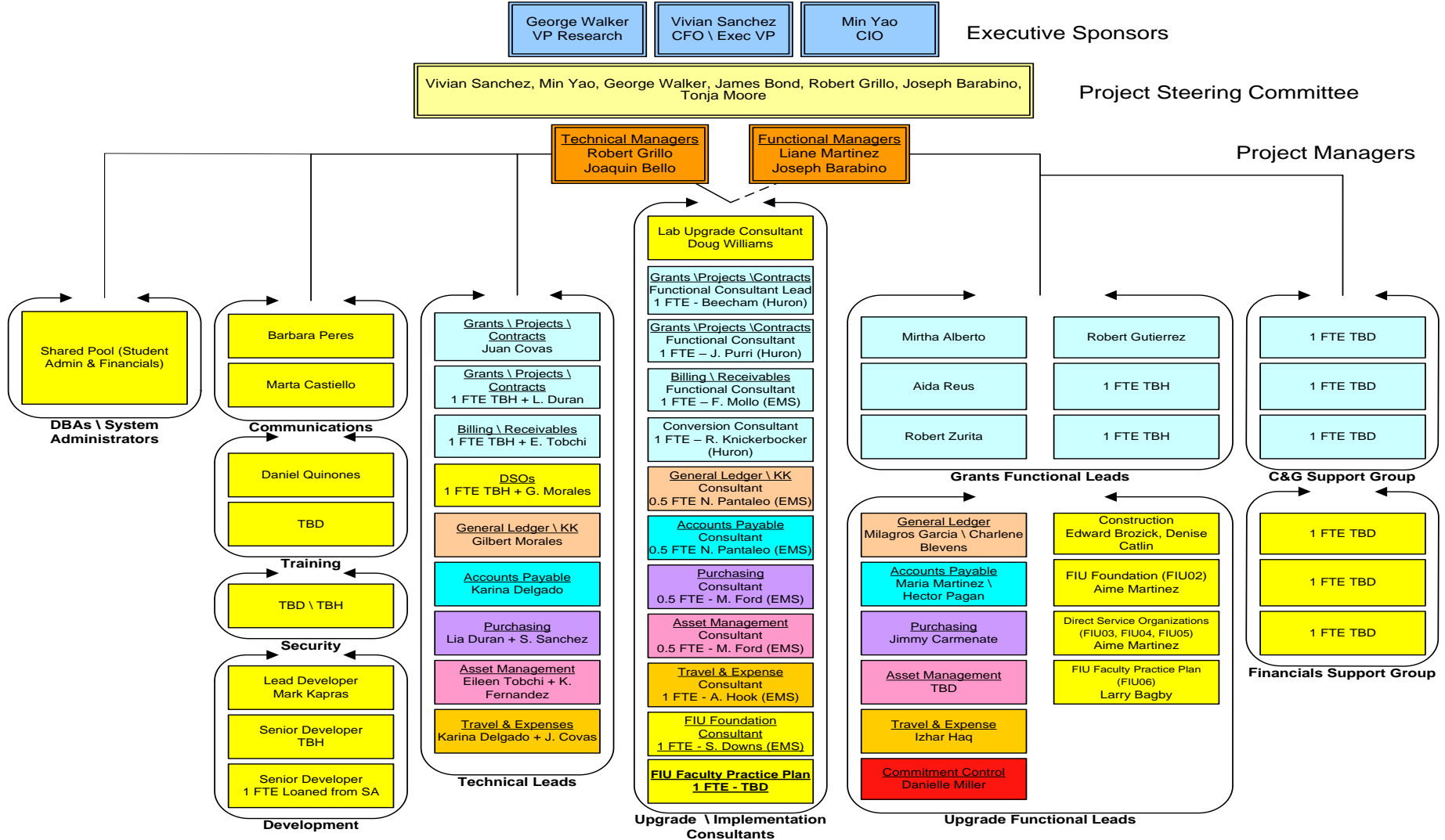
Project Planning	Fit-Gap Assessment	Design	Build	Test	Implementation
Detailed Project Scope Documents	Inventory of ResearchAdministration Business Processes	Functional and Technical Design Documents	Programming Standards	System Test Plan	Go Live Checklist
Project Work Plans	Current Business Process Flow Documents	Configuration Guides	Final Modification Documentation	Test Scenarios and Scripts	Cutover Plan
Strategy & Approach Documents	User Group Profiles	Modification Estimating Guide	Developed Reports	Integration Scripts	Help Desk Procedures
Communication Plan and Status Reporting Procedures	General Business Requirements Documentation	Final Approved Modification Listing	Testing Results	Performance Testing Scripts	Job Aids
Project Team Training Plan	Fit-Gap Analysis - Conceptual Designs	Unit Testing Requirements	Batch Schedule	End User Acceptance Scripts	Lessons Learned
	Interface Requirements	Security Approach & Design	Conversion Programs	Conversion Test Scripts	
	Security Requirements	Data Conversion Design and Migration Documentation		Testing Issue Logs	
	Workflow Requirements	Training Manuals			
	Common Modification Listing				
	Standard Configuration Inventory				
	Report Inventory				
	Issue Logs				

Project Schedule and Timeline

Phases	May-08	Jun-08	Jul-08	Aug-08	Sep-08	Oct-08	Nov-08	Dec-08	Jan-09	Feb-09	Mar-09	Apr-09	May-09	Jun-09	Jul-09
Planning															
Design															
Configuration															
Business Processes															
Development															
Testing															
Training & Communication															
Implementation & Cutover															
Production Support															

Project Organizational Chart

Financials Upgrade & Grants Implementation Team Organizational Chart



Project Activities and Deliverables

Project Initiation

- Activity Description
 - Project planning, setup, and getting the ball rolling!
- Deliverables
 - Project Approach and Workplan
 - Policies & Procedures
 - Roles & Responsibilities
 - Orientation
 - Templates
 - DEMO Database
 - Issue Log

- Activity Description
 - Assess current business processes, define future business requirements, and compare both to PeopleSoft Grants functionality to identify areas that fit and those that do not.
- Deliverables
 - Current Process Documents
 - Fit-Gap and Recommendation Documents
 - Grants Configuration Document
 - DEV Database

- Activity Description
 - Analyze gaps in functionality identified during the Fit-Gap phase. Determine how to resolve each gap via a business process change, focused end user training, or through a modification.
- Deliverables
 - Report Inventory
 - Conversion Strategy and Plan
 - Conversion Data Inventory
 - PeopleSoft to legacy system data mapping (version 1)
 - Change Management Strategy and Plan

- Activity Description
 - Prioritize, document, and approve modifications, reports, and interfaces identified during the Analysis phase.
- Deliverables
 - Detailed Design Specifications for:
 - Modifications
 - Reports
 - Interfaces

- Activity Description
 - Develop modifications, reports, and interfaces approved during the Design phase. Conduct Unit Testing to verify developed product conforms to design specifications.
- Deliverables
 - Developed Modifications and Reports
 - Developed Conversion Programs
 - Testing Strategy
 - TEST Database
 - Security Roles and Permission Lists

- Activity Description
 - Conduct System Test to validate end-to-end pre-award business processes, Integration Test to simulate business process and data flows, and execute a final conversion process test. Perform end user community training.
- Deliverables
 - Test Scripts
 - Successful Test Execution
 - User Acceptance
 - End User Training and Job Aids

- Activity Description
 - Execute final conversion, verify production environment is operational, and cut-over from existing legacy systems.
- Deliverables
 - Successful Conversion
 - PROD Database
 - Successful Go-Live

Project Activities and Deliverables

Post Implementation

- Activity Description
 - Provide functional and technical end user support.
- Deliverables
 - Additional End User Training and Job Aids as Required
- Duration and Completion Date
 - Ongoing

PeopleSoft Grants Considerations

Implementing the Grants Module: Considerations

- Use of the project ID chartfield
- Additional fields required for Projects:
 - PC Business Unit
 - Activity ID
 - Analysis Type
- Critical data elements to track through the system
- Use of commitment control and budgetary controls
- Method of tracking cost sharing
- Replacement of current F&A calculation mechanisms
- Integration between pre award and post award data
- Integration to billing and accounts receivable
- Additional reporting needs and capabilities

Implementing the Grants Module: Benefits

- Fully-integrated system
- Simplifies and streamlines business processes
- Proposal Tracking
- Simplified and more robust reporting
 - Ad-hoc queries for keywords, certifications, etc.
 - Integrated reports with data from pre-award and post-award
 - Award/contract/project relationships for reporting and analysis
- Delivered F&A (sponsored, waived and cost-shared F&A) – in a one step process
- Billing – Fixed price, cost reimbursable, letter of credit, prepaids
- Integration with feeder modules, General Ledger, Billing, and Accounts Receivable

Implementation Challenges

Environment

- Differing business processes
- Coordinating configuration
- Accounting and reporting variations
- Training and communication

Custom Requirements

- Business Process Re-Design
- Top 20 modification list
- Robust reporting inventories

Technology Integration

- Simultaneous Financials Upgrade
- Competition for resources
- Additional “moving parts”
- Greater number of constituents

Data Conversion

- Additional data sources, translations and data mapping
- Additional validation and testing coordination
- Greater need for data clean-up and quality initiatives

Pre-/Post-Award Balance

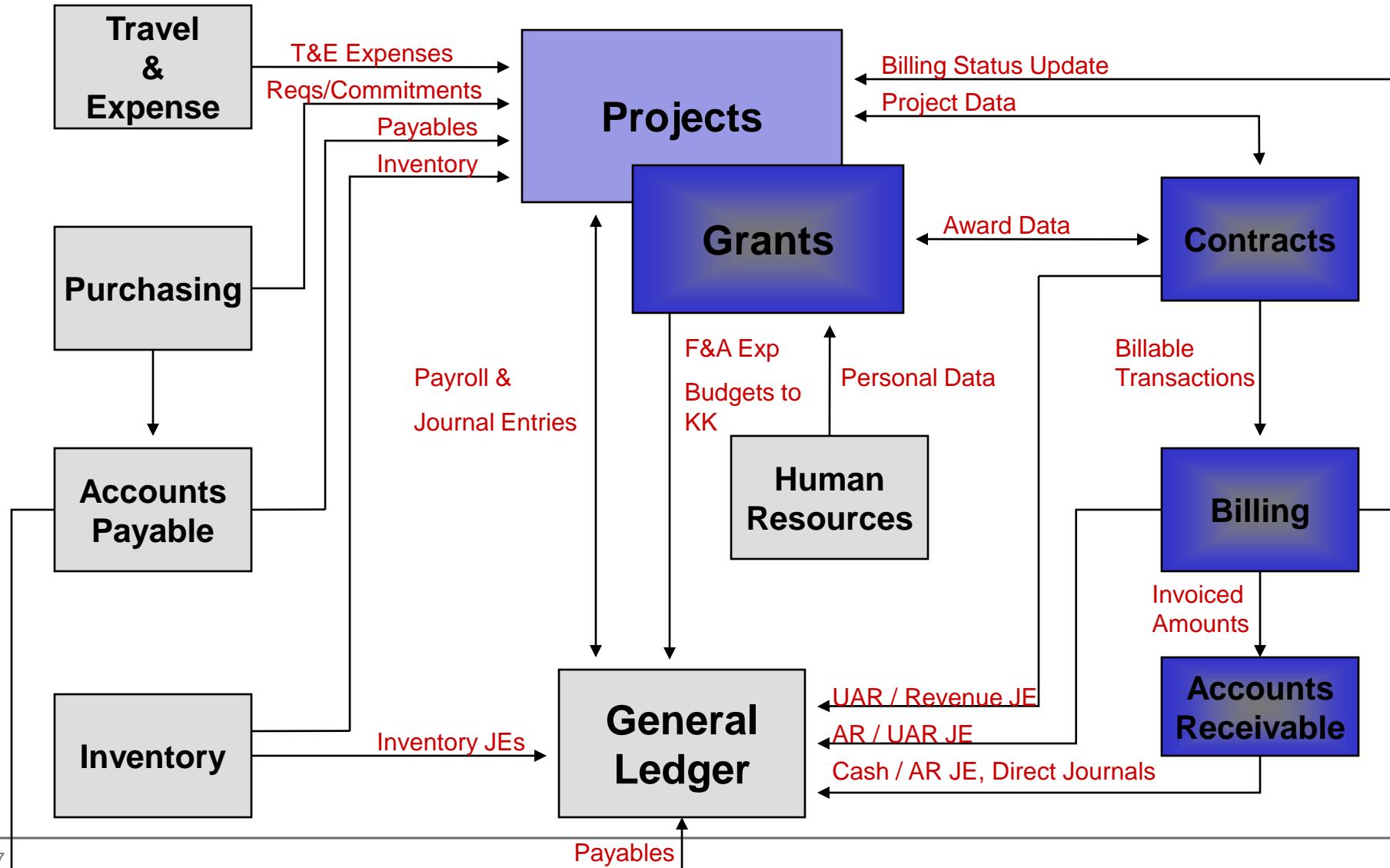
- Identifying and prioritizing needs of both areas
- Coordinating appropriate data transfer points
- Prioritizing and balancing technical and functional requests

Questions



PeopleSoft Grants Suite Demo

Grants Integration with Financials



PeopleSoft Grants Modules

- Grants (30 minutes)
- Contracts (30 minutes)
- Project Costing (30 minutes)
- Billing (60 minutes)
- Accounts Receivable (30 minutes)