Agenda

• Vision and Goals
• Project Strategy & Scope
• Reasons for Upgrade
• Functionality Highlights
• Proposed Project Org Chart
• Team Roles and Responsibilities
• Oracle Upgrade Lab
• Phases & Timeline
Vision and Goals

• Vision
  Provide world-class, innovative and integrated Financials system and technical infrastructure in support of FIU’s vision to be a Top Urban Research University.

• Goals
  • Upgrade FIU Financials system to the most recent PeopleSoft release as part of the FIU approved maintenance strategy and to ensure business continuity
  • Enhance and simplify user interface
  • Improve use of resources through operational efficiencies such as workflow and work centers
  • Reduce customizations by taking advantage of new functionality and features
  • Update and streamline existing business processes
  • Lower the total cost of ownership (TCO)
Project Scope

- Upgrade will involve all FIU business units including DSOs
  - FIU01 and FIU02 thru FIU10
- All implemented Financial modules, including Grants suite are subject to upgrade
- All existing interfaces, such as Campus Solution, Human Resources, Pinnacle, Maximo, HighJump, Aleph, ECRT, etc. will be reviewed and adapted for upgrade
- Smart ERP products, such as Smart Grants, Smart Billing and Smart Journal will be evaluated and re-deployed as part of upgrade
- Payroll Transfers functionality will continue reside in Financials and will be evaluated and re-applied
- Brainware (IntelliCapture) application, currently being implemented (tentative go-live date July 2014) will have to be reviewed and re-tested
- Major functionality enhancements such as additional workflow and work centers will be setup and configured

Note: Upon completion of the Fit/Gap phase, we will publish the detail list of proposed enhancements and new functions to be deployed as part of the upgrade.
The proposed Project Strategy assumes start of the project in April 2014 and anticipates the Go-Live date of January 5th, 2015.

FIU engaged three functional consultants to lead the Fit/Gap phase, deploy release enhancements, recommend best business practices and deliver testing strategy. The Queries and Reporting consultant will be selected in the near future.

- Procure to Pay
- General Ledger
- Grants Suite
- Query and Reporting

The Fit/Gap phase is scheduled to start on May 12th, 2014 with anticipated duration of 6 weeks.

FIU contracted the Oracle Upgrade Lab known as Application Solution Center to perform the technical part of the upgrade.
Reasons for Upgrade

- **Strategic Purpose**
  - Allows FIU to stay current and on track to maintain the latest version of our enterprise applications
  - Align technology with FIU’s strategic plan
  - Take advantage of enhancements to the application to improve and streamline processes

- **End-Users improvements - 9.2 is simpler and more intuitive to use**
  - Familiar Global search experience
  - Effortless navigation using contextual related actions
  - Highly visual self-service and business process flows

- **Impact on Management - Staying current more easily and at a lower cost**
  - Tailored software maintenance addresses your unique needs
  - Reduced need for customizations through functionally robust solutions
  - Affordable operation using PeopleSoft Upgrade Manager

- **Functional, back-office enhancements - 9.2 improves team productivity**
  - Over 1,000 new functional enhancements across the suite
  - 15+ cockpit-style command Work Centers
  - 60 real-time, multi-dimensional, decision support analytics
Delivered 9.2 Functionality Highlights

- **Secure Enterprise Search (SES) and Global Search**
  - Global Application Search feature enables users to search across multiple, related components

- **WorkCenters**
  - WorkCenters allow to configure the transactions and work area for users to complete sets of tasks based on their functional area. Financials 9.2 includes WorkCenters for these applications: Payables, Billing, Receivables, General Ledger, Project Costing, Grants and Projects, and Supplier Administration

- **Workflow (AWE) improvements**
  - Ability to add an ad-hoc approver, comments and attachments during the approval cycle
  - Workflow availability to support Commitment Control Budget Journals, Procurement and Asset Management flows

- **Pivot Grids**
  - Provide self-service, interactive, analytical grids and charts for users to segment and filter data
Delivered 9.2 Functionality Highlights

- **Forms and Approval Builder**
  - This tool offers analysts the ability to specify an unlimited number of various field types to appear on a form; define instructions, attachments, and approval routing paths for forms; and map the form fields to PeopleSoft Component Interfaces so that the form can feed data into a PeopleSoft transaction.

- **Attachments are extend to the following areas:**
  - Expenses, Receivables, Payables and Asset Management

- **Embedded Help**
  - Detailed, embedded help is available for users when they select the information (question mark) icon available on group boxes, grids, or scroll areas on a page

- **New PeopleSoft Online Help Solution**
  - Interface looks and functions much like a website rather than the book format structure for help documentation in the past
Delivered 9.2 Functionality Highlights

• Online Supplier (Vendor) Registration & Collaboration
  • Following capabilities are available for the Vendor (now renamed Supplier)
    • Self-service registration for new suppliers and new bidders
    • Employee self-service supplier registration
    • Manage supplier approvals & invitations

• PeopleSoft Continuous Delivery Model
  • Deliver new capabilities and features on a continual basis - outside of major releases. This manner that is less disruptive than an upgrade.

• Mobile Applications
  • PeopleSoft Mobile Expenses and eProcurement

• PeopleSoft iPad Certification
  • The PeopleTools certification on the Safari browser offers not only the ability to use dashboards and WorkCenters on your iPad, but you can do almost anything on your iPad that you can do on your desktop system.
Roles & Responsibilities

Executive Team
- Provides executive oversight
- Provides project goals and objectives
- Makes major scope and workflow decisions

Steering Committee

Project Management Team
- Ensures adherence to strategic objectives
- Provides day to day management of implementation
- Ensures project is on time and within budget

Functional Managers

Functional Leads

Technical Managers

Technical

Consulting

Security

Development

Training

Subject Matter Experts
- Develops and executes training strategy, programs and schedules
- Grants and Financials Leads
- Support consultants as subject matter experts
- Provides functional expertise for process review and fit/gap analysis
- Leads fit gap sessions and provide insight into best practices
- Guide users in decision making based on system functionality
- Leads testing and validation
- Provides technical expertise on PeopleSoft modules for process review and fit/gap analysis
- Provides technical expertise in system design and configuration
- Implements system design
- Develops processes, programs and reports
- Maintains Roles, Permission lists and User IDs for the existing and new functionality
Oracle Upgrade Lab

- Oracle Lab or Application Solution Center (ASC) is being used to expedite the technical upgrade process, use Oracle experienced resources and ensure the accuracy of the upgrade.
- Contract was signed already and Kick-off meeting took place.
- The Financials Production DB was shipped to ASC on April 19.
- This constitutes official ‘FREEZE’ to Financials, where all PeopleTools objects should remain unchanged throughout the Upgrade.
- ASC initial schedule is as follows:

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<th>Week No</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
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<th>7</th>
<th>8</th>
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- Preps
- Lab Upgrade
- 1st Move to Prod
## Project Phases & Deliverables

<table>
<thead>
<tr>
<th>Phase</th>
<th>Deliverables</th>
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<tbody>
<tr>
<td>Planning</td>
<td><strong>Define</strong>&lt;br&gt;Scope&lt;br&gt;Resources&lt;br&gt;Communication&lt;br&gt;Project Plan&lt;br&gt;&lt;br&gt;<strong>Identify</strong>&lt;br&gt;Current functionality used&lt;br&gt;Current business processes&lt;br&gt;New features to improve business processes&lt;br&gt;Additional business process improvements for next phase&lt;br&gt;Current customizations&lt;br&gt;New features to eliminate current customizations</td>
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<tr>
<td>Fit/Gap</td>
<td><strong>Determine &amp; Configure</strong>&lt;br&gt;New features to implement&lt;br&gt;Customizations to bring forward&lt;br&gt;Update configuration&lt;br&gt;Configure new functionality&lt;br&gt;Additional business process improvements</td>
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<td>Design</td>
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Project Phases & Deliverables

Build
- Changes to existing customizations to accommodate new release
- Changes to reports to accommodate new release
- New customizations if applicable
- Create new reports if applicable
- Security to support new structure

Test
- Testing
  - Unit: PantherSoft per module
  - System: FSSS and RIS
  - Integration between modules
  - User Acceptance: University Users using test scenarios

Implement
- Upgrade
  - Performed in Production
  - Development objects are migrated
  - Security is migrated
  - Production Quality Testing is performed
  - Operations resume in upgraded environment
What is Test Move to Production?
This is an instrumental phase of the Oracle upgrade methodology. It's a repetitive effort to create a new upgraded copy of a database to test features and functions delivered thru the upgrade with the latest production data. It repeats until desirable results are achieved and users are satisfied.
Next Steps

- Complete Oracle Upgrade Lab delivery
- Schedule and coordinate fit/gaps sessions & participants
- Provide Steering Committee with detailed list of proposed enhancements and functions to be delivered
- Communications Plan