



# PeopleSoft Financials Application Upgrade and Fit/Gap Session Overview

David Nisbet

January 14, 2014

# WebEx Housekeeping

---

ALL AUDIO will be handled via  
conference call today.

Please dial in:

**(646) 307-1300, access code 9759227**

# WebEx Housekeeping

---

- Submit questions via the chat function to all participants
- We may hold some of the questions until the end of the presentation
- Recording and slides will be available later today or tomorrow

# Agenda

---

- Application Upgrade Scope and Goals
- Overview of Application Upgrade Phases and Timeline
- Fit/Gap Process and Upcoming Sessions
- Fit/Gap Schedule
- Fit/Gap Participant Roles and Responsibilities
- Q&A

# Application Upgrade Scope

---

- Upgrade to Version 9.2/PeopleTools 8.53
- Integrate with current partners
- Comply with Federal, State, and USG-required reporting
- Training and documentation
- System performance management and monitoring

# Application Upgrade Scope

---

Not in scope:

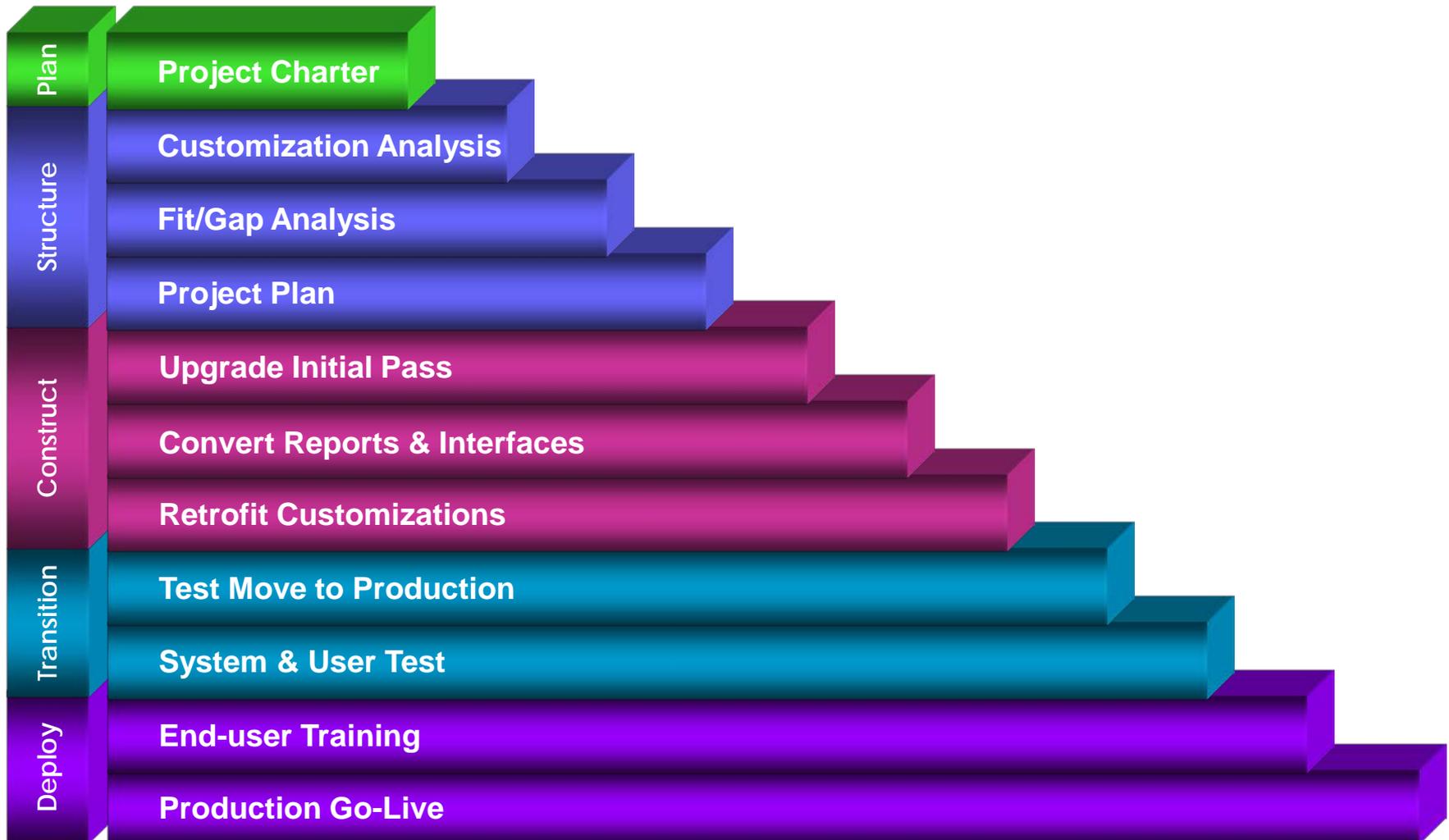
- Introduction of new modifications
- Introduction of new modules

# Application Upgrade Goals

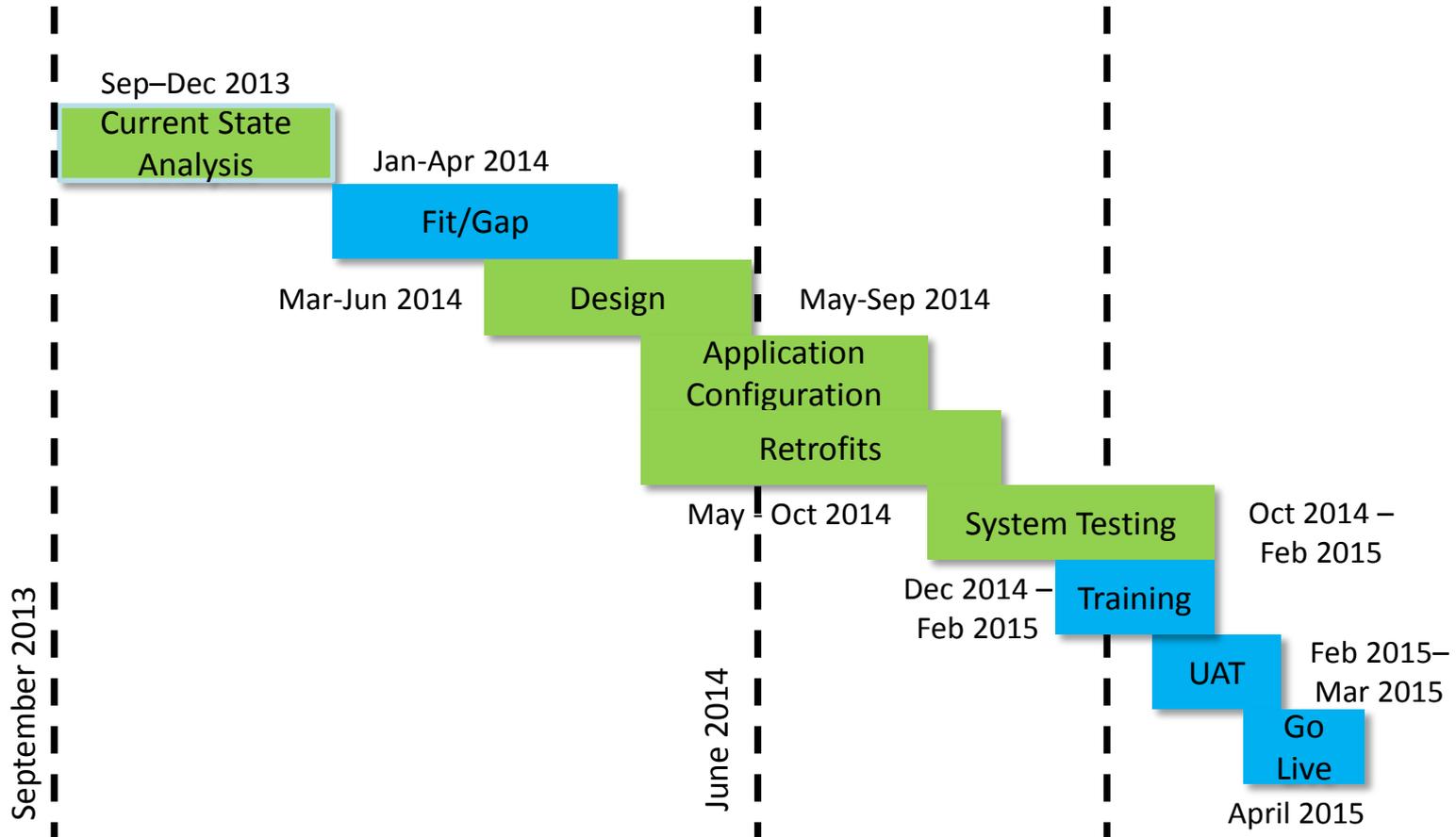
---

- Reduce modifications
- Reduce complexity
- Increasing standardization, i.e., chart of accounts
- Improve expense functionality
- Improve Budget Preparation functionality
- Better align support resources
- Develop a mobile strategy
- Increase automation of current manual processes

# Upgrade Methodology and Phases



# Upgrade Timeline



# Fit/Gap Session Schedule

MODULE	Start Date	Finish Date	Duration
Asset Management	Wed January 22	Thur January 23	2 days
Budget	Tuesday January 28	Thur January 30	3 days
General Ledger & KK	Tuesday February 4	Friday February 7	4 days
ePro/SciQuest	Monday February 10 afternoon	Tuesday February 11	1.5 days
Purchasing	Wednesday February 12	Friday February 14	3
Accounts Payable	Tuesday February 18	Friday February 21	4
Expenses	Tuesday February 25	Friday February 28	4
Reporting & Queries	Thursday March 6	Friday March 7	2
Security	Tuesday March 4	Wednesday March 5	2

- All Sessions will be held in Athens in the ITS training room
- Sessions will generally be 8:30 am – 12:00 pm and 1:30 pm – 4:00 pm

# Fit/Gap Participation

---

- Fit Gap Sessions are **NOT** a training session
- Each participant needs to be an active contributor to the discussions
- Module team decisions could be made during the session
- Need to have a general understanding of the module processes and requirements at your institution

# Fit/Gap Process

---

- Fit Gap Sessions will be led by an Oracle Consultant with facilitation support by ITS
- Consultant will demo 9.2 and discuss module area processes with participants with the goal of generating requirements
- The consultant will be trying to understand why our process is what it is

# Fit/Gap Process

---

- The consultant will then map our process and requirements into the application
- The Consultant will be asking us **WHAT, WHY, HOW, and WHEN** we do these processes or sub-processes
- The final deliverable is a Requirements Document

# Fit/Gap Session Logistics

---

- All sessions will be held at ITS in Athens: 2500 Daniels Bridge Road #300 (1<sup>st</sup> brick building)
- ITS Training Room is located on first floor to the right
- Hotel accommodations at Springhill Suites
  - Located within site of the ITS building
  - 3500 Daniels Bridge Rd Athens, GA, (706) 353-8484
  - Ask for ITS BOR rate of \$82
- Feel free to contact David Nisbet (706)583-2094 or [david.nisbet@usg.edu](mailto:david.nisbet@usg.edu)

# Q&A

---

## **Application Upgrade and Fit/Gap WebEx Q&A**

Q: Is there a limit to the number of attendees from each institution?

A: Yes. Only one representative from each institution selected for a particular fit/gap session should attend. Not every institution will be represented at every fit/gap session.

Q: Will viewing from campus be available for the fit/gap session?

A: Yes. We plan to broadcast the fit/gap sessions via WebEx or conference call. Participation will not be possible via WebEx (only onsite at ITS), but those who would like to observe the sessions may do so remotely.

Q: Can you publish a list of the participants designated to attend each fit/gap session?

Yes. We are still waiting to receive confirmation from a couple of institutions about their representatives. As soon as that has been finalized, we will publish the list of the representatives that each institution has identified to participate on the GeorgiaFIRST website and will post an announcement to the listservs.

Q: Will a notice be sent to the registrants for each fit/gap session?

A: No. Please see the session schedule and the logistics included in the slide presentation for details.