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

- **Plan**
  - Project Charter
  - Customization Analysis
  - Fit/Gap Analysis
  - Project Plan

- **Structure**
  - Upgrade Initial Pass
  - Convert Reports & Interfaces
  - Retrofit Customizations

- **Construct**
  - Test Move to Production
  - System & User Test

- **Transition**
  - End-user Training
  - Production Go-Live

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Upgrade Timeline

Current State Analysis
Sep–Dec 2013

Fit/Gap
Jan-Apr 2014

Design
Mar-Jun 2014

Application Configuration
May 2014

Retrofits
Oct 2014

System Testing
Dec 2014 – Feb 2015

Training

UAT
Oct 2014 – Feb 2015

Go Live
Feb 2015 – Mar 2015

Go Live
April 2015

Upgrade Timeline

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# Fit/Gap Session Schedule

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

- 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 (1st 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
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?
A: 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.