PeopleSoft 9.2 Upgrade

Financial Area Representatives Meeting
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Presenter
Javier Martinez,
Sr. Director of Financial Information Systems

UTSA Financial Affairs

Overview

What is a PeopleSoft 9.2 upgrade?

- UTShare upgrade to the current release of PeopleSoft's system to acquire latest information system version and process improvements.

Which UTShare areas?

- All UTShare processes are included
- Including all customizations and interfaces

UTSA is partnered with UT System's Office of Shared Information Services (SIS)

- SIS is project lead

UTSA Processing Departments in Project

- Office of Financial Affairs & Controller
- Business Information Systems
- Budget & Financial Planning Office
- Purchasing Department
- Human Resources
- Research Finance & Operations Office

- Accounting Services
- Disbursement & Travel Services
- Payroll Office
- ProCard – Travel Card Administration
- Financial Services
- Fiscal Services
- Inventory
- Surplus

UTShare 9.2 Upgrade

Project Status

- Green and on track for Go Live on week of June 10.

Code Freeze

- Pause on all requested deferred improvements until project completion.

UTShare 9.2 Upgrade

Dates	Project Timeline Segments	Status
1/22 - 1/28	Upgrade process 2nd pass in TST	Completed
1/29 - 2/8	SIS Technical Retrofit	Completed
2/11 - 3/1	SIS Business Analysts TST system testing	Completed
3/4 - 3/8	Alliance Conference freeze	Completed
3/11 - 3/15	Upgrade process 3rd pass in UAT	Completed
3/18 - 3/22	Technical Retrofit	Completed
3/25 - 3/29	SIS Business Analysts UAT system testing	In Process
4/1 - 5/30	**Campus UAT functional testing** (finding errors, debugging, and retesting)	**Pending**
30-May	Go Live Decision	Pending
6/1 -6/2	Go Live Implementation	Pending
10-Jun*	9.2 Live (*Go Live is the week of June 10)	Pending

What Are We Testing? Everything.

- All Interfaces
- All Reports
- Portal Functionality
- Workforce Administration (HR)
- Benefits
- Commitment Accounting (Position Funding)
- Time & Labor
- Absence Management
- Payroll

- Travel & Expenses
- Accounts Payable
- Asset Management
- Banking Management
- Projects – Capital Projects
- Treasury
- Commitment Control (Budget)
- eProcurement
- General Ledger

What Is Next?

After Go Live, we pivot to sustainment and improvement mode.

Prioritizing and planning timelines of new enhancements is underway by UTShare governance, Operating Committee and Executive Committee

- **36 major enhancements are requested**
  - Budget Transfer Workflow
  - Financial Reconciliation
  - Employee & Manager Self Service – Time Labor & Absence Reporting
  - eForm Workflow enhancements

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