PeopleSoft 9.2 Upgrade

Financial Area Representatives Meeting
March 27, 2019

Presenter
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Director of Financial Information Systems
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 June 1.

Code Freeze
  • Pause on all requested deferred improvements until project completion.
## UTShare 9.2 Upgrade

<table>
<thead>
<tr>
<th>Dates</th>
<th>Project Timeline Segments</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/22 - 1/28</td>
<td>Upgrade process 2nd pass in TST</td>
<td>Completed</td>
</tr>
<tr>
<td>1/29 - 2/8</td>
<td>SIS Technical Retrofit</td>
<td>Completed</td>
</tr>
<tr>
<td>2/11 - 3/1</td>
<td>SIS Business Analysts TST system testing</td>
<td>Completed</td>
</tr>
<tr>
<td>3/4 - 3/8</td>
<td>Alliance Conference freeze</td>
<td>Completed</td>
</tr>
<tr>
<td>3/11 - 3/15</td>
<td>Upgrade process 3rd pass in UAT</td>
<td>Completed</td>
</tr>
<tr>
<td>3/18 - 3/22</td>
<td>Technical Retrofit</td>
<td>Completed</td>
</tr>
<tr>
<td>3/25 - 3/29</td>
<td>SIS Business Analysts UAT system testing</td>
<td>In Process</td>
</tr>
<tr>
<td>4/1 - 5/30</td>
<td><strong>Campus UAT functional testing</strong> <em>(finding errors, debugging, and retesting)</em></td>
<td>Pending</td>
</tr>
<tr>
<td>30-May</td>
<td>Go Live Decision</td>
<td>Pending</td>
</tr>
<tr>
<td>6/1 - 6/2</td>
<td>Go Live Implementation</td>
<td>Pending</td>
</tr>
<tr>
<td>3-Jun</td>
<td>9.2 Live</td>
<td>Pending</td>
</tr>
</tbody>
</table>
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