



PeopleSoft 9.2 Upgrade

Financial Area Representatives Meeting
July 24, 2019

Presenter
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Sr. Director of Financial Information Systems



UTShare 9.2 Upgrade

Dates	Project Timeline Segments	Status
9/1/18 - 1/28	Upgrade process 1st and 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	Completed
4/1 - 5/30	Campus UAT functional testing	Completed
30-May	Go Live decision	Completed
6/1 -6/2	Go Live implementation	Completed
10-Jun	9.2 Live <i>(original date June 1)</i>	Completed

UTShare 9.2 Upgrade

Project Status

- Completed
- We went live on June 10
- Update and cutover rated: Success

What Was Upgraded? Everything.

- 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

Modules Changed Most

Travel Expense

- Location changed for: **Action Buttons, Workflow History** and **Budget** information
- **Save for Later** button on hyperlink
- **Accounting Detail** hyperlink in Cash Advances
- **More Options** menu (approval page located in upper right corner)
- **Quick Start** menu changes on Expense Reports: *Populate from*
- **Create/Modify** actions combined

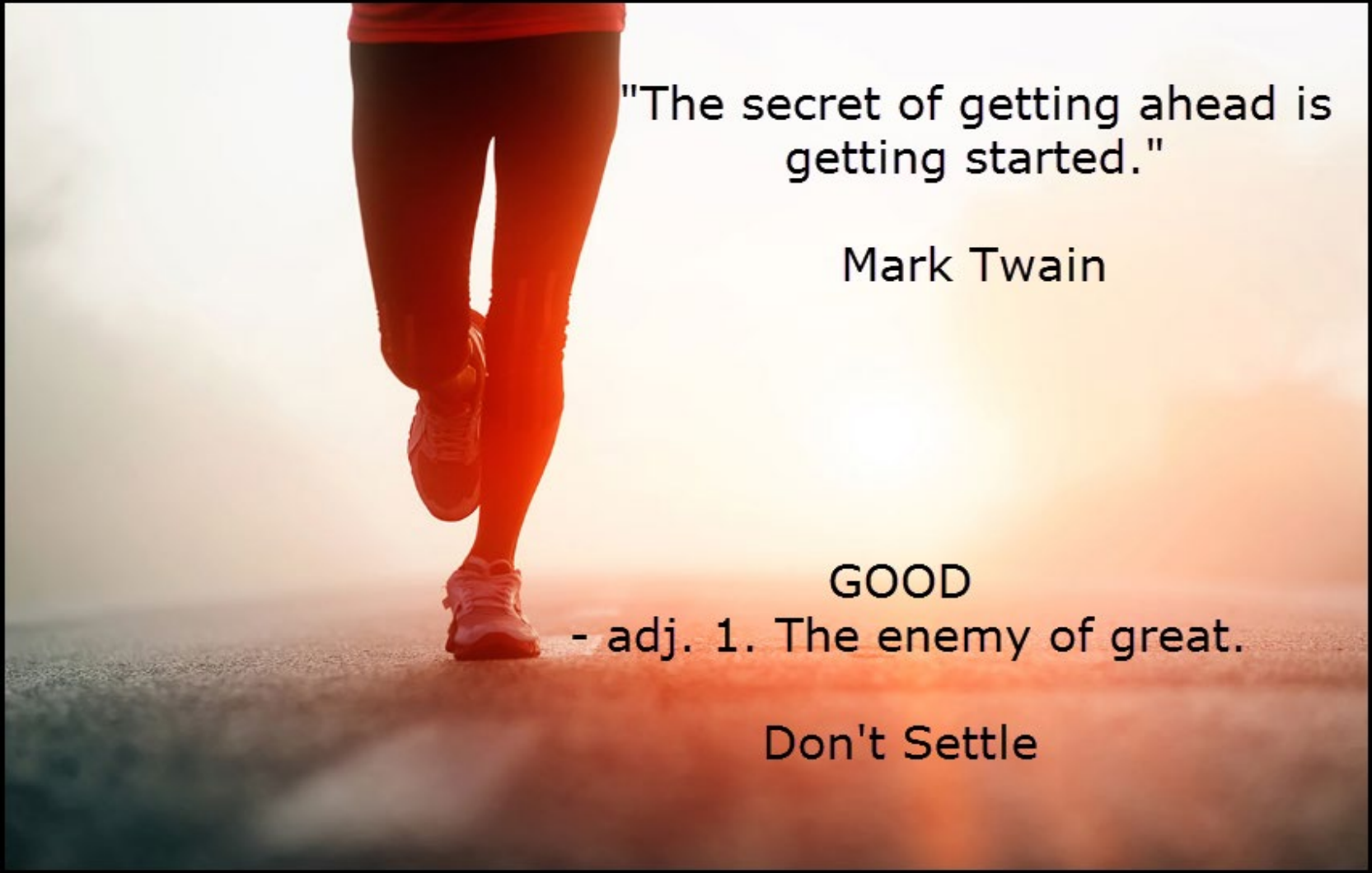
Accounts Payable

- “**Suppliers**” replaced *Vendors* term
- New layout and reorganization; links grouped together on voucher’s right side
- New **Save for Later** action button

9.2 Job Aids

- Job Aids updated for 9.2 procedures
- Locations
 - Financial Affairs Training
utsa.edu/financialaffairs/training/
 - Business Information Services
utsa.edu/bis/psupgrade/jobaids.html

What Is Next?



"The secret of getting ahead is getting started."

Mark Twain

GOOD

- adj. 1. The enemy of great.

Don't Settle

What Is Next?

Planned Enhancements

- Financial Reconciliation
- Budget Transfer Workflow
- Employee & Manager Self Service – Time Labor & Absence Reporting
- eForm Workflow enhancements
- Fluid – improved interface and navigation
- Double Deduction Redistribution (*Testing Now*)

Double Deduction Redistribution Project

- Status: Campus testing and validation
- Complete testing by end of July
- If project passes testing and approved:
 - Run June redistribution in July
 - Run July redistribution by July Accounting month close

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