Q & A WITH JIM CORKILL
DIRECTOR OF BUSINESS & FINANCIAL SERVICES

What are the key differences between Phase 1 and Phase 2 of the FSIP?
Phase 1 is focused exclusively on getting the current financial system off the mainframe and onto a more stable and versatile platform (PeopleSoft Financials). Given this urgency and all the other systems the campus is adjusting to right now, we wanted to minimize the impact on departments during the first phase. Phase 2 is where it gets interesting for the campus. It is going to be really important to have departmental involvement during Phase 2, especially on the Grants Module. It will also be critical for departments to get trained on navigating and utilizing PeopleSoft Financials.

Why is this project important?
The University of California is one of the largest employers in California and has annual operating expenditures of $25 billion as of fiscal year 11-12. Our campus must be able to report reliable and timely data to the Office of the President or else we hold up the whole UC system from reporting...as well as other state and federal agencies.

When I first came to UCSB in the late 1990’s, departments were receiving only paper ledgers on a monthly basis. Basically, you had to wait a whole month to find out where you were financially. If a department wanted real-time data, they had to invest and create ‘shadow systems’ to provide timely information about their financial position. Once the data warehouse was established, the types and numbers of shadow systems on campus grew as did their functionality and complexity since no central solution was provided. Our campus has not replaced our financial system in over 40 years, so this project is long overdue. PeopleSoft will bring a level of real-time reporting and functionality that our campus has not seen before.

How has Phase 1 been going so far?
I am very pleased with the amount of progress we have made in the last 10 months, especially considering all the issues unrelated to the project that we have had to address like the conversion to biweekly pay, external audits, the disruption with the general ledger, and other technical issues that required urgent attention. Beyond that, we have discovered that our campus requirements related to the data conversion, interfaces, reports, and workflows are more complex than was originally anticipated. I am very thankful for the strong partnerships we have with the PMO and the Ciber team to work through these issues.

What have been the biggest challenges you have faced during this project?
We have lost a lot of institutional knowledge regarding how some of our processes work, and why they were established in the way that they were. This has been a real challenge and underscores the urgency of this project. Despite the lack of institutional knowledge, the Business Process Teams have been working very hard to complete the data mapping, data conversion, and data validation. We are also documenting what we are doing on an ongoing basis so that the loss of institutional knowledge is less of a risk in the future.

Read the full interview at http://www.pmo.ucsb.edu/questions-jim-corkill