Project Description
The Financial System Implementation Project (FSIP) is a phased implementation of PeopleSoft Financials to modernize UCSB’s financial system and move systems off of the mainframe. The FSIP will last through 2015 and dramatically improve the stability and efficiency of UCSB’s financial system. UCSB has contracted with Ciber, an IT consulting firm, to implement and host the system.

Status Update on the Configuration
Configure Base System – The base system has been configured for all modules (General Ledger, Accounts Payable, Commitment Control, Project Costing, Asset Management). This is the foundational stage of the configuration; testing will drive additional configurations.

Data Mapping for Conversion – Approximately one-third of the conversion items have been mapped from the mainframe system to the new data structures in PeopleSoft Financials. The initial conversion and loading of chart field values and object codes have been completed.

Functional/ Technical Specifications – Approach papers are underway with the first six most critical customizations approved by functional teams.

Configuration Documentation – The configuration documentation for all modules has been completed with base configuration values. Documentation of the configuration as it changes is an ongoing effort that will be critical to the long term maintenance and support of the system.

Next Steps
• Finalize test plan and test inventories.
• Finalize data mapping for the conversion and complete and load data conversion.
• Begin development for the required interfaces.
• Prioritize and select candidate reports for development.
• Continue data modeling sessions with the UCSB Business Processes Teams.
• Finalize the scope for the third party interface for the real time applications.

Recent Accomplishments
• Consolidated Fit Gap documentation is undergoing a final review.
• Ciber added a Reporting Tech and an Integration Tech to the implementation team.
• A status reporting procedure for the functional teams is now in place.
• We held meetings and conducted an analysis of options related to the Grants and Expense modules in preparation for review and direction by the PMO Steering Committee.
• Completed a review of Mainframe Migration Requirements.
• Gave presentations on the Financial System Implementation Project to the following groups:
  - Academic Senate Council on Planning & Budgets
  - Housing & Residential Services Managers
  - Organizational Effectiveness Steering Committee
  - Environmental Health & Wellness
  - IT Forum

Project Leadership
Executive Sponsors
Gene Lucas
Executive Vice Chancellor
Ron Cortez
Administrative Services

Team Leaders
Brian Richard
Administrative Systems PMO
Jim Corkill
Business and Financial Services
Eric Sonquist
Institutional Advancement
Donna Trimble
Chemistry

Project Manager
Jessie Masek
Administrative Systems PMO

Communications Lead
Matt Erickson
Administrative Systems PMO

PeopleSoft Administrator
Graham Tomczik
Oracle DBA/PeopleSoft Admin

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