SOFTWARE
SPEAK

Wednesday, April 23, 2013
Presentation Agenda

1. Introduction
2. Financial System Project Status
3. Year End Close Updates
4. Announcements
5. Comments & Questions
Finding This Presentation

Presentation slides: www.ets.ucsb.edu/presentations
Presentation slides & audio: http://gauchocast.ucsb.edu/Panopto/Pages/Viewer/Default.aspx?id=3d9d247d-80dc-4618-89ca-ae77185b0163
Financial System Implementation Project

STATUS REPORT
Data Conversion

Project Costing

PC data has been converted.

Data validation is in process.

All other data needed for current testing has been converted and validated.
Data Warehouse interfaces are currently being jointly reviewed and analyzed before being made available for the team to test data warehouse reports or queries.

Other interfaces...

have been delivered to UCSB from Ciber and are being tested.
Workflows

Out of 9 workflows ...

3 have been completed.
3 in the Cooperate phase have been scheduled.
3 in the Mentor phase have been scheduled.
Customizations

All customizations have been delivered to UCSB for testing.

Of 18 total customizations, 11 have successfully completed Unit Testing and are ready for System Integration Testing.

The other 7 customizations are being Unit Tested.
Reports

There are 24 customized PeopleSoft reports.

7 are being tested.

3 are expected to be delivered for testing by April 28.

14 are being scheduled.
Knowledge Transfer

Functional Training

• An outside consultant has been hired to assist in these areas.
• We have completed developing the training materials.
• We are using the UPK tool to record and document training materials so that they are available online, 24/7 to the B&FS staff.
• Three B&FS super users are being trained on all PeopleSoft modules.
• We are still recruiting for some B&FS positions.

Technical Training

• We have hired a contract PeopleSoft Administrator as backup.
**System Integration Testing (SIT)**

Due to the large number of interfaces and customizations on this project:

- SIT is taking longer than expected.
- We are being more cautious with testing due to the increased complexity (RISK).
Next Steps

1. Complete Project Costing data validation and Unit Testing.

2. Complete Data Warehouse analysis & Unit Testing.


4. Continue training functional and technical resources to ensure a successful post-go-live.
Lessons Learned
From Past Systems Implementations

1. Testing before deployment
2. Training before deployment
3. Communication is important
4. More departmental consultation
5. Support resources are needed
6. Consult with end users/experts
7. Plan implementation better
8. Too many changes at once
9. Understand complexity
10. Provide feedback opportunities
Year End Close

UPDATES
ANNOUNCEMENTS
Timekeeping (Kronos)

Late June is the target for existing Kronos users to cutover from Kronos v.6.3 to v.7.

More details will be announced shortly.
Campus-wide IT Needs Survey

Goal:
Shared understanding of baseline Departmental IT needs

When:
Wednesday, April 16 – Tuesday, April 29

Who:
All employees (faculty & staff)

Visit ETS.UCSB.EDU to access the survey link.
QUESTIONS