Florida A&M University

Enterprise Resource Planning

Briefing Document
Overall Project Objectives

Vision Statement
To create an integrated, client-focused, information technology system designed to make administrative processes more effective and efficient, and give students, faculty and staff better access to information, thereby, maintaining our competitive advantage in our efforts to recruit and retain students; incorporating people, process and technology improvements.

Scope
The scope of this project includes implementing PeopleSoft applications to replace the existing student, human resources, and financial systems. Whenever possible, the modules will be implemented without modifications (customizations). Current business processes will be reviewed with the intent to enhance these processes by utilizing the functionality built into the software, which is based on best business practices.

Mission
The mission of the Enterprise Resource Planning Project is to implement a flexible and integrated management information system that provides access to accurate, timely, and relevant data in support of the mission of Florida A&M University.

Business Drivers
The implementation of the PeopleSoft suite of software applications is driven by:

- The University’s need to have its own Financial Management System to replace State Accounting Systems (SAMAS/FLAIR) and the State Payroll System.
- The need to capture data and provide accurate reporting on the business processes and activities of the University.
- The need for a financial management system that will support enterprise performance management for budgeting purposes.
- The need for a system to inform the development and implementation of University strategies.
- The need to update the technology to be competitive with other institutions of Higher Learning.
- The fact that the Financial, H/R, and Student systems are rapidly approaching the end of their useful lives.
University Objectives

General Objectives:

- Implement the system without customization unless it is clearly justified and cost beneficial.
- Implement “Best Practices,” the successful institutional practices used as a model for the software.
- Make standard reports available electronically and enhance the ability to produce customized reports at the user level.
- Provide online access to data.
- Provide appropriate training and support for access to online data.
- Implement the software on-time and within budget.
Vision Statements
FLORIDA A&M UNIVERSITY
VISION STATEMENTS

UNIVERSITY MANAGEMENT

People Improvements

- Learn the University’s strategic direction.
- Understand the process flow from strategic plans to objectives to budgets to execution to analyze execution to improve strategic planning, objectives and budgets.
- Learn skill-sets for using the configuration tool set to maintain the university management system.
- Learn skill-sets for using the university management system.
- Transfer user skill-sets to campus users to enable them to understand and use the system.
- Improve cross-functional collaboration across the strategic planning, budgeting and financial reporting business units.
- University change management and commitment to the objectives.

Process Improvements

- University’s objectives are achieved and resources utilized continue to remain within budget.
- Consistent on-plan and within budget information – reduce need for shadow budget and accounting systems.
- On-plan and within budget information is updated real time.
- Automate the management process flow.
- Standardize and simplify all processes in the management process flow.
- One-day closing process.
- Automate all accounting rules and all chart of accounts classifications.

Technology Innovations

- Provide spreadsheet as the Advanced Planning System modeling tool for strategic planning, budgeting, and pro-forma financials.
- Assure business intelligence to provide online planning, budgets and financial analysis.
- Queries to monitor online plans remain within budget.
Self-service planning and budget submissions/revisions.
Automated workflow for planning and budget submissions/revisions.
Spreadsheet as form tool for budget preparation and automated journal entries.

**HUMAN RESOURCES**

**People Improvements**

- Learn the process flow mindset of recruit to retire.
- Learn the configuration skill-sets for maintaining the human resource system.
- Learn the skill-sets for using the human resource system.
- Learn the process flow of position control and position requisitions (appointments) authorization process.
- Learn the position and employee data elements required to populate the master databases.
- Learn the module interrelationships required to develop appropriate workflows.
- Learn the requirements for interfacing (uploading/downloading) and transferring data to external systems/applications learn internal and external reporting requirements.
- Learn the skill-sets to produce required views and reports.
- Transfer user skill-sets to the user training team.
- Improve cross-functional collaboration across the recruit to retire business units.
- Bottom-up change management and commitment to the objectives, thereby enhancing employee ownership and process involvement.

**Process Improvements**

- Improve human resource productivity by:
  - Eliminating redundant data input.
  - Creating electronic workflows and approval processes for recruitment to retirement.
  - Creating mass database/table update routines as appropriate.
  - Automating generation of communiqué' i.e. letters/memo, electronic notification.
• Utilizing role-based front-end edits to identify errors and exceptions early in transaction processes.
• Providing role-based online employee benefit and training enrollment.
• Providing role-based online employee information update capabilities.
• Providing online views and reports for employees and administration.
• Providing online access to imaged and electronic documents.

➢ Recruit, develop and retain human resources using:

• Online applicant tracking and appointment process.
• Competency based employee skill/education and training databases.
• Consistent information to manage human resources productivity and administration-eliminate shadow and stand alone systems where possible.
• Standardize and simplify required approvals for all processes in the recruit to retire process flow.

Technology Innovations

➢ Business intelligence for human resource analysis.
➢ Queries for human resource information.
➢ Self-service modules.
➢ Automated workflow for:

• Position requisitions.
• New hires, promotions, terminations.
• Wage and salary changes.
• Performance appraisals.
• Training activities.
• Electronic and imaged document repositories.
PAYROLL

People Improvements

- Learn the process flow mindset of employee to paycheck – assignment, distribution, employee changes and time worked.
- Learn the configuration skill-sets for maintaining the payroll system.
- Learn the skill-sets for using the payroll system – payroll staff and departmental payroll staff.
- Transfer user skill-sets to the user training team.
- Improve cross-functional collaboration across the employee to payroll business units.
- Bottom-up change management and commitment to the objectives – buy-in by departmental staff.
- Learn payroll regulations, both state and federal.

Process Improvements

- Automate employee to paycheck process flow using self-service and workflow.
- Standardize and simplify all processes in the employee to paycheck process flow (2 levels of approvals).
- Produce more accurate paychecks the first time and reduce payroll corrections.
- Eliminate distribution of physical pay checks and statements.

Technology Innovations

- Business intelligence for time and attendance and faculty/staff effort reporting.
- Queries for human resource information.
- Self-service modules.
- Automated workflow for:
  - Time and attendance.
  - Faculty/Staff time and effort.
  - Travel reporting.
STUDENT ADMINISTRATION

People Improvements

- Learn the process flow mindset of recruiting to collections.
- Learn the configuration skill-sets for maintaining the student relationship management system.
- Learn the skill-sets for using the student relationship management system.
- Transfer user skill-sets to the user training team.
- Improve cross-functional collaboration across recruiting to collections business units.
- Bottom-up changes management and commitment to the objectives.

Process Improvements

- Improve student relationships throughout the admissions, registration, tuition assessment and collections and graduation processes.
- Consistent information to manage student relationships - eliminate shadow and stand-alone systems.
- Automate recruiting to collections process flow.
- Standardize and simplify all processes in the recruiting to collections process flow.
- Eliminate redundant processing of student transactions.
- Reduce the number of student transactions processed (manually).

Technology Innovations

- Business intelligence for declined/accepted offers, student admissions, student population, and student turnover.
- Queries for student information.
- Self-service modules.
- Automated workflow for recruitment to collections.
VENDOR RELATIONS

People Improvements

➢ Learn the process flow mindset of requisitions to payments.
➢ Learn the configuration skill-sets for maintaining the vendor system.
➢ Learn the skill-sets for using the vendor system.
➢ Transfer user skill-sets to the user training team.
➢ Improve cross-functional collaboration across the requisition to payment business units.
➢ Bottom-up change management and commitment to the objectives.

Process Improvements

➢ Reduce the cost of commodities and services.
➢ Consistent information to manage vendor relationships – eliminate stand-alone systems.
➢ Automate requisitions to payment process flow.
➢ Standardize and simplify all processes in the requisitions to payment process flow.
➢ Eliminate redundant processing of vendor transactions.
➢ Reduce the number of vendor transactions processed.

Technology Innovations

➢ Business intelligence for vendor analysis and commodity analysis.
➢ Queries for vendor information.
➢ Self-service modules.
➢ Automated workflow for requisitions to payment.
➢ Internet trading exchanges for bids and quotes.
➢ E-commerce to/from vendors.
FACILITIES AND PROPERTY MANAGEMENT

People Improvements

- Learn the process flow mindset of acquire to retire.
- Learn the configuration skill-sets for maintaining the facilities and property management system.
- Learn the skill-sets for using the facilities and property management system.
- Transfer user skill-sets to the user training team.
- Improve cross-functional collaboration across the acquired to retire business units.
- Bottom-up change management and commitment to the objectives.

Process Improvements

- Quantify and reduce the total cost of property ownership.
- Provide consistent information to manage property availability and maintenance.
- Reduce shadow and stand-alone systems.
- Standardize and simplify all processes in the acquired to retire process flow.
- Quantify and maximize the cost effectiveness of maintenance spare parts inventory levels.
- Provide timely and relative information to manage and account for construction projects.
- Provide timely and accurate information for the maximum utilization of University facilities.
- Spare Parts.
- Space Utilization.

Technology Innovations

- Business Intelligence for property maintenance.
- Queries for property information.
- Automated workflow for the transfer of property.
- Facilitate and monitor system interface and/or integration issues.
OVERSIGHT TEAM

To help produce a consortium ERP system which empowers and serves students, faculty, and employees with timely and efficient processes that permit access only to data that is supposed to be accessed and which includes adequate controls to meet, monitor, and report on Federal, State, Department of Education, and University requirements in an effective and efficient manner using Best Practice guidelines to achieve objectives.

➢ To be independent “In all matters related to ERP…”
   ❖ Carry out the tasks relating to the ERP role in an objective and rational manner without bias.

➢ To ensure adequate PeopleSoft implementation practices to include:
   ❖ Maintaining Technology Infrastructure goals.
   ❖ Compliance with technology infrastructure directions and standards.
   ❖ Technology viability assessment.
   ❖ Installation, maintenance and change controls.
   ❖ Upgrade, conversion and migration plans.
   ❖ Use of internal and external infrastructures and/or resources.
   ❖ Supplier responsibilities and relationships.
   ❖ Change management.

➢ Implement System software security processes which include:
   ❖ A data administration group to define controls access to the PeopleSoft data, system tables, and the data dictionary.
   ❖ System control policies and procedures defined, documented, trained and monitored.
   ❖ Adequate security administration.
   ❖ Appropriately defined, restricted, and actively administered User records.
   ❖ Operator role definitions have the appropriately defined, restricted, and actively administered.
   ❖ Review for inconsistencies in relationships between operator ID, operator class, employee ID, and job descriptions.
   ❖ A comprehensive review trail that is established and regularly reviewed.
   ❖ PeopleSoft maintenance and development functions which have been appropriately restricted.
   ❖ Appropriate access for users to system components who are authorized to make changes to ensure the integrity of processing data by PeopleSoft.
- Programs that have been submitted for execution are only by authorized users.
- Production programs which have been created and changed by authorized personnel only.
- Query programs that can be created and changed only by authorized user.
- Making regular back up of programs and documentation supporting the project throughout this process, and after production installation.
- Adequate disaster contingency planning and processes.

**INFORMATION TECHNOLOGY (IT)/TECHNICAL INFRASTRUCTURE**

- Standard personal productivity tools aligned with ERP system.
- Standard messaging system aligned with ERP system.
- Standard multi-dimensional database management system and relational database management system aligned with ERP system.
- Standard desktop hardware and operating systems aligned with ERP system.
- Standard server hardware and operating systems aligned with ERP system.
- Standard network hardware and operating systems aligned with ERP system.
- 99.9% IT infrastructure uptime.
- Least total cost of IT infrastructure ownership.

**USER TRAINING AND COMMUNICATIONS**

**People Improvements**

- University-wide training.
- University understands the vision.
- University is informed on the work plan status.
- People have new mindsets.
- All users have the skill-sets to use web portal, self-service modules and workflow.
- Managers and primary users have skill-sets to use information systems.
- New knowledge and new skills
Process Improvements

- Mandatory training before access.
- Continuous communication, update campus-wide.
- Refresher courses and help process availability.
- Clean data reports as needed without delays.
- Up-to-date technology for everyone.
- Increased efficiency accountability and audit trails.
- Reduce paper using electronic work flow.
- Beginning-to-end transactions through shared data.
- Levels of approval.
- Notification of deadlines.

Technology Innovations

- On-line access to training material.
ERP Systems and Modules
### ERP Systems and Modules Acquired from PeopleSoft

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e…* = Self service applications (web-based)
Project Organization
Project Organization

The University manages this project in a team approach, with a Vision Team providing direction. The University is undertaking this project with a diverse group of professional, experienced and motivated people, including current senior level employees and implementation specialists on contract to the University, who are committed to working as a team to successfully complete the project on time. The core personnel upon whom success of this project ultimately rests upon is defined in the Project Team Members Profiles section.

Vision Team

The Vision Team is accountable for the successful completion of the ERP project. The committee represents the full functional scope of the project, including the Student Administration, Financial Management, Human Resources/Payroll and Information Technology/Infrastructure components. The Vision Team provides high-level direction and coordination, as well as resources for the project.

Responsibilities:

- Ensure project success and commitment from University Administration.
- Resolve strategic people issues.
- Make executive decisions to adopt new business process as they arise for the University.
- Give support to the FAMU ERP team with timely responses to issues and give ERP team executive support campus-wide.
- Back fill staffing for team leaders and team members.
Vision Team Members

Louis Murray, Committee Chair and Acting Vice President for Administration

Gladys Lang, Acting Provost and Vice President Academic Affairs

Barbara Barrett, Acting Vice President Student Affairs

Dhyana Ziegler, Acting Vice President Research and Director Planning and Analysis

Beverly Barrington, Project Director ERP

Dolores S. Davis, Associate Vice President for Student Affairs and Director of Financial Aid

Stephany Fall, Acting Director Purchasing

Samuel Houston, Director Facilities Planning

Michael James, University Registrar

Norman Johnson, Professor, School Business Industry

Kendall Jones, Director Physical Plant

Joyce Mann, Director Budgets

Edward Mitchell, Director University Computing Systems Center

O’Leary Sanders, Inspector General

Marie Shetty, Associate Controller

Nellie Woodruff, Director Human Resources/Personnel


**Project Manager**

The Project Manager is responsible for the day-to-day operations, deliverables, and implementation of the Project. The Project Manager will work directly with all aspects of the Project to ensure that critical issues are identified and resolved, the components of the project are being delivered in accordance with the project schedule and that all aspects of the project are properly and sufficiently coordinated. The manager will champion the vision and mission statement for the project.

**Responsibilities:**

- Resolve issues that project teams cannot resolve.
- Plan the project and maintain the project work plan.
- Cross team coordination.
- Communicating and implementing the vision.
- Organize the teams and filling the team leader and team member positions.
- Manage and maintain accountability for quality and timelines of deliverables across implementation and functional teams.
- Document work plan and approach.
- Provide training needs analysis and define skill and knowledge requirements.
- Obtain equipment, space and facilities.
- Project planning, scope and budget management.
- Create standard templates, processes, and deliverables.
- Liaison with Vision Team Members.
- Project structure and organization, staffing and retention.
- Procure consultant services and coordinate all consultant engagements.
- Definition of project standards (communication and protocols).
- Develop relationship with PeopleSoft product development teams.
- Develop communication with internal and external constituents.
Team Leaders

Each functional implementation team will have a functional Team Leader with virtually full-time project responsibilities. Functional Implementation Team Leaders are accountable to project management.

Responsibilities:

- Manage and maintain accountability for quality and timelines of deliverables identified for each functional team.
- Manage team and resource dynamics.
- Cross functional communication and ensure issue resolution.
- Provide input to the project plan.
- Communication and coordination with project manager.
- Ensure adherence to project and team norms by team members.
- Manage and adhere to the scope resolution process.
- Assist in the transition planning.
- Communication with external constituents and campuses.

Information Technical (IT) Team

The Information Technology team will provide technical support for the functional teams during the implementation of the software.

Responsibilities:

- Technical design of the module and the interfaces.
- Infrastructure architecture design for ERP systems.
- Assist in design of approved modifications, enhancements, and additions to the PeopleSoft system.
- Fit/Gap analysis of the module and the interfaces.
- Process mapping of the module and the interfaces.
- Test plans.
- Provide input to the project plan.
- Assist in application set-up and configuration.
- Identification and communication of cross functional issues and processes and notification to project manager.
- Team interaction and working skills.
- Strong technical skills.
Florida A&M University

Enterprise Resources Planning

Team Profiles
**Project Management**

*It is the goal of the Project Manager to deliver to Florida A&M University an Enterprise Resource Planning System that empowers students, faculty, administrators and staff by simplifying business processes. This “state of the art” software application will provide on-line access to data, and enable self-service for many activities that currently require a series of requests and interactions. The Project Manager must ensure that the project is on-time and within budget.*

**The Project Manager:**
- Beverly Barrington, an experienced Information Technology Professional with more than 17 years of experience in Computer Information Systems and computer-related programming. Prior to assuming leadership for the Florida A&M University Enterprise Resource Planning Project, she served as Project Leader for the information-acquisition related activities and as a Member of the ERP Steering Committee. As Project Manager for Florida A&M University’s Enterprise Resource Planning Initiative, Ms. Barrington is responsible for ensuring that critical issues are identified and resolved, the components of the project are being delivered in accordance with the project schedule and that all aspects of the project are properly and sufficiently coordinated.

**The project includes:** the design, (Structure Phase), development (Construct Phase), testing (Transition Phase), implementation (Deployment Phase) and Stabilization Phase with subject-matter expert teams organized to address the following functions:
- University Management (Financials)
- Vendor Relations/Purchasing
- Facilities and Property Management
- Sponsored Research
- Human Resources
- Payroll
- Student Administration

Ongoing support for the functional/implementation teams will be provided by the
- Information Technology/Information Architecture Team
- Communication, Education and Training Team
- Oversight Consultant
University Management

It is the goal of the University Management Team to increase the professionalism and effectiveness of university administration through immediate access to financial data and increased ability for planning, budgeting and analysis.

The Team will implement the following modules:

- General Ledger
- Receivables (Financial)
- Billing (Non-Student)
- Treasury Management (Cash Management)

The Team consists of:

- Ronica Mathis (University Budget Office) serves as Co-Team Leader. She has 26 years experience in budgeting and accounting, five of which have been with the University’s Budget Office and two with the University’s Payroll Office.

- Vinod K. Sharma (University Controller’s Office) serves as Co-Team Leader. He has worked for the University in excess of 30 years. He started as a student worker in the Controller’s Office, became Budget Officer, then Associate Controller. In 1986, he became University Controller and in 1994 his position was reclassified to Assistant Vice President and University Controller.

- Teresa Mitchell (University Controller’s Office) has 12 years of governmental accounting experience in financial statements, general ledger, property, accounting systems as well as prior experience with PeopleSoft implementation.

- Rosetta Price (Office of Academic Affairs) has 17 years experience in budgeting, nine of which have been in the Office of the Provost and Vice President for Academic Affairs and eight in the University Budget Office.

- Marie Shetty has worked for the University for 25 years. She started her employment with the State of Florida in July 1970 with the Department of Education and then went to the Florida Board of Regents. In November 1977, she became an accountant with Florida A&M University and was promoted to Associate Controller in 1986.

- Veronica Stokes (University Controller’s Office) has 13 years of State University System (SUS) experience, nine of which have been in the Florida A&M University Controller’s Office. Her experience includes general accounting, accounts payable, construction accounting and financial reporting.
Facilities and Property Management

It is the goal of the Facilities and Property Management Team to enable FAMU administrators, faculty and staff to have a faster means of placing orders for service, and the opportunity to monitor orders as they move through the system; while providing an effective and efficient system for Plant Operations Management Staff to manage the work load.

The Team will implement the following modules:

- Asset Management
- Capital Projects
- Inventory

The Team consists of:

- Kelvin Rosier (Physical Plant Service Response Center - SRC) serves as Team Leader and has close to 10 years of organizational and administrative experience, including three years at Florida A&M University in both Human Resources and Administration. As Physical Plant – SRC Coordinator, he has been responsible for ensuring that clients (faculty, students, administrators and staff) receive quality and professional care from the FAMU Physical Plant for system outages as well as minor projects and work order processing.
Vendor Relations

*It is the goal of the Vendor Relations Team to reduce the number of steps and simplify the process of ordering, receiving, inspecting, and paying for goods and services while providing on-line monitoring of purchasing activity by both the buyer and the seller.*

The Team will implement the following modules:

- eProcurement
- Accounts Payable
- Expense
- Strategic Sourcing

The Team consists of:

- Oscar Martinez serves as Team Leader, comes to the ERP Team with over 29 years in purchasing administration. In addition to providing oversight for the University’s development of RFPs, competitive bids, negotiations and state contracts, he has served as the principal liaison between administrators and academic/student functions related to the planning of purchases and the compliance with state and university policies.

- Marvin Johnson has more than 20 years of professional and technical professional experience in both the public and private sectors. Most recently as PC Coordinator for Florida A&M University’s Plant Operations Maintenance Department. Among his accomplishments is the design and development of the software currently used by the University’s Student Health Service. Also, he has served as a consultant and system designer for the software that provided the income tax program for the Republic of Georgia.
**Human Resources**

*It is the goal of the University through the Human Resources Team, to equip management and staff with the tools to effectively administer the recruit-to-retire employee life cycle via automated, efficient and fluid business work flows. At the same time, the PeopleSoft Human Resources module will afford employees, through self-service, 24-hour access to view and revise personal information that systematically updates their personnel information.*

**The Team will implement the following modules:**

- Workforce Administration
- Base Benefits
- Recruitment
- Position Management
- Health and Safety
- Salary Planning

**The Team consists of:**

- Clydie Hubbard serves as Team Leader and has 28 years of experience in personnel administration. As the Assistant Director, Human Resources/Personnel Relations for Florida A&M University, she has managed the day-to-day operations of the Classification and Pay, Benefits, Attendance and Leave, Employer/Employee Relations, Employment and Payroll sections of the department.

- Carmelesa Crosby-Harley has 18 years of professional work in Human Resources, Labor Relations and Training. She served as a Human Resources Coordinator and an Employment Policy and Planning Specialist for the Florida Board of Regents prior to joining Florida A&M University. At Florida A&M University, she serves as the Educational/Training Programs Coordinator.
Payroll

It is the goal of the Payroll Team to pay employees accurately and on time while allowing employees on-line access to view and update their personal information, as needed.

The Team will implement the following modules:

- Payroll
- Time and Labor

The Team consists of:

- Patricia Thompson serves as the ERP Team Leader. She serves as Assistant Director of HR/Payroll with 26 years of experience while employed at Florida A&M University. She has spent the majority of that time working with payroll and benefit issues.

- Gwendolyn Carroll has 24 years of experience at Florida A&M University working in the Computer Center in various computer related positions, currently serving as Computer Systems Control Specialist. She has extensive knowledge of all systems and databases used in processing the University’s payroll.
**Sponsored Research**

*It is the goal of the Sponsored Research Team to increase the number of grant applications and the amount of revenue generated through grant and contract awards by delivering a system that simplifies the application process and automates and standardizes all the steps from the proposal to the project close-out.*

The Team will implement the following modules:

- Projects
- Grants
- Contracts
- Receivables
- Billing

The Team consists of:

- Barbara Clayton is Team Leader and brings over 21 years of research administration experience in the pre-award, post-award areas and Contracts & Grant Accounting. Ms. Clayton has worked at both FSU and FAMU and also as Revenue Management Officer at Health Rehabilitative Services. She is a member of the National Council of University Research Administration. Ms. Clayton moves to the ERP Team from her position as Assistant Vice President for Sponsored Research.

- Sheila Wesley is a Certified Research Administrator and a former Associate Director of Florida A&M University’s Sponsored Research Division. She brings over 30 years of research administration experience primarily in the pre-award but also the post-award areas. Since the majority of her professional career was served at Georgetown University, she has experience in both private and public systems. Ms. Wesley has also served as fiscal consultant on several Program Project Site Visits for the National Institute of Health (NIH).
Student Administration

It is the goal of the Student Administration Team to provide students with a broader range of services and alternative ways to interact with the University (i.e., web portals, electronic mail, telephone, as well as office visits).

The Team will implement the following modules:

- Academic Structure/Campus Community
- Collaborative Applications
- Recruitment & Admissions
- Student Records
- Financial Aid
- Student Financials
- Academic Advising

The Team consists of:

- Agatha Onwunli, the team leader who has 13 years experience in the Florida A&M University Registrar’s Office. Most recently she has served as the Assistant University Registrar - Student Records. Her responsibilities ranged from updating student records to assisting in policy development and advising the campus community on policy changes regarding student records.

- Ivenell Hewitt has worked for over 17 years at Florida A&M University. Her duties have included processing student financials, the cashier’s office, Title IV accounting, and loans and collections. During her tenure the Cashier’s Office implemented an automated cashiering system, student accounts and Title IV.

- Freda Donald has worked for the Financial Aid Office as Assistant Director for over three years. During this period she was instrumental in the installation and implementation of the Federal Direct Loan Program. She has served as the system administrator for the financial aid server and she has installed software and configured desktop computers in support of the EDExpress and EDConnect applications.
Communication, Education & Training

It is the goal of the Communication, Education & Training (CET) Team to have the entire Florida A&M University community understand and appreciate the benefits that will accompany the adoption of the Enterprise Resource Planning System, and gain the necessary knowledge and skills to effectively use the PeopleSoft applications.

The Team consists of:

- Dolores Brown, who is team leader, joins the ERP team with more than 20 years of experience in corporate and organizational communication in both the corporate and non-profit sectors. She has completed the Change Management Program developed by Accenture (formerly Andersen Consulting) and has prior experience in providing communication and change management support for a major PeopleSoft implementation.

- Alice Charles Wilson, with 17 years of administrative support experience within Florida A&M University, other state agencies, and private establishments; her duties included the development, design and delivery of training to administrative and support staff.
Information Technology

It is the goal of the Technology Team to ensure that the University has the computer equipment and software that is necessary to enable successful operation of its Enterprise Resource Planning System.

The Team consists of:

- Matthew Gaines, who is Co-Team Leader, joins the ERP team with approximately ten years of experience as Manager of Systems Design and Applications; and a total of 25 years at Florida A&M University’s Computer Systems Center. He served as a member of the ERP Steering Committee and developed the technical requirements that were included in the Solicitation Document inviting vendors to submit proposals for the project. Also, he was instrumental in the development of the Information Systems Development Methodology (ISDM) for Florida A&M University.

- Scott Menard, who is Co-Team Leader, brings more than 20 years of experience in computer application systems with Florida A&M University. Prior to joining the ERP Team, he served as Computer Application Coordinator with the responsibility for planning, designing, developing and managing complex automated systems in support of the University’s administrative functions. His accomplishments include the design and development of RattlerLink, a web-based student inquiry and self-service system.

- Michael Simmons brings more than 20 years of experience in Distributed Processing Systems. He has experience in system design, engineering and administration serving as; Systems Integration Analyst, Technical Support Engineer, Security Manager and Windows 2000 Network Engineer. In addition, he has served as Test Evaluator for the Naval Research Laboratory where he developed government acceptance test procedures for software, hardware and database upgrades for six Naval Distributed Processing Systems.
Oversight Consultant

*It is the goal of the Oversight Consultant to ensure that the system is in compliance with Federal, State, Department of Education, and University requirements while operating effectively and efficiently.*

The Team consists of:

- John Cooke, who holds more than 20 years of experience with the United States Air Force and large system implementation. He represents Florida A&M University as one of the three-person Consortium Oversight Team. He is a Certified Information Systems auditor having conducted Information Security, Compliance and Performance audits for the University as well as the Florida Department of Juvenile Justice.
Florida Universities Consortium

Enterprise Resources Planning

Project Team Members
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Florida A&M University

Enterprise Resources Planning

Project Status Report
September 2002 – November 2002
In the past few months, the University has formed a team to plan and implement the PeopleSoft software applications for Financial Management, Human Resources/Payroll and Student Administration. As of today, these teams have been actively involved in tasks that are preparing them for future implementation activities.

The FAMU ERP Project has successfully completed the PeopleSoft Conference Room Pilot. During this activity, each team member was introduced to the PeopleSoft various functional applications within PeopleSoft and provided the opportunity to gain a level of familiarity and understanding of their particular process area.

In the next few months, the FAMU ERP Project Team will be intensively involved in Training classes offered by PeopleSoft University. These training classes will enable each project member to extend his or her knowledge and skill-sets as it relates to the implementation of PeopleSoft systems. Each team member will receive training based on their functional area and other cross-functional team requirements. While training will be an ongoing activity for each process team, the first set of classes will enable team members to begin the initial configuration of various functional modules included in the foundation phase.

**Current Schedule and Tasks of FAMU Project Teams**

**October 15 – October 31**

PeopleSoft Demo Environment

Downloading of Module Tables for configuration phase

**November 3 – November 14**

People Books Tutorials

PeopleSoft Skills-on-Demand courses

Discussion and Resolution of Process Team Issues.

Collaboration of process teams with discussion focused on shared tables and identifying owners of the shared tables.

FAMU University Team Members attend General Ledger course offered at the University of Florida (2 team members).

FAMU Student Administration Team and User Training Team visit the University of Central Florida to review their configuration of the Student Administration Module.
November 18 – November 21 – Tallahassee, FL
General Ledger Training Course
Human Resources/Benefits Training course
PeopleSoft PassPort Courses available via Web
PeopleSoft PeopleBooks Tutorials

December 2 – December 5
General Ledger Training Course
PeopleTools Training Course
Human Resources/Benefits Training Course (Gainesville)
PeopleSoft PassPort Courses available via Web
PeopleSoft PeopleBooks Tutorials

FAMU Process Team Deliverables and Tasks Completed

University Management Team

Deliverables and Tasks Completed

- University Management Team discussed Chart of Accounts, Financial Reporting, combination edits, speed types and available reporting tools in PeopleSoft.
- Created a preliminary mapping of FLAIR to PeopleSoft Chartfields based on the chart of accounts discussion.
- Discussed commitment control and how to test the budget control process.
- Gained general understanding of the university consortium financial structure paralleled to Peoplesoft’s financial module – as it related to Chart of Accounts and ChartFields, business units, business units attributes, accounts, funds, department ID, program code, projects/grants.
- Described types of financial reporting to be used for university departments, State, and Federal Agencies, such as department reports – budget/actual detail; budget/actual summary; transaction detail/payroll actual; IPED, CFDA reports; F&A rate proposal allocation not in PeopleSoft; return of indirect cost; Letter of Credit (LOC) drawdown; internal/external surveys; interest earnings.
- Completed Data Flow diagrams for departmental workflow.
- Gained general understanding of PeopleSoft budgetary process including budget preparation, commitment control, budget adjustments and budget reporting; processed budget and expense transactions to the General Ledger.
- Attended demonstrations on the EPM module which is a strategic management tool that measures, and analyzes organizational performance (Budgeting).
- Discussed the initial draft of FAMU’s chart of accounts with University Controller and Budget Director.
- Participated in PeopleSoft tutorials and demo database for general ledger, accounts payable, human resources and campus community applications.
- Participated and conducted configuration exercises within specified modules.
- Identified processing issues and/or gaps related to configuration exercises.
- Developed an initial list of gaps, workflows, conversions and interfaces.
- Completed detailed work plans for implementation to specified modules with the Financial System.
- Developed a list of all tables associated with the identified modules to be implemented for base table configurations.

**Sponsored Research Team**

**Deliverables and Tasks Completed**

- Conducted overview demonstrations of the Grants module that included Pre- and Post Awards, Projects/Contracts.
- Participated in Chart of Accounts, Projects, Grant Reporting, HR, Time and Labor discussions.
- Participated in hands-on sessions of modules within PeopleSoft such as:
  - Proposal Preparations and Submission
    - Proposal Information
    - Enter Proposal Budget Periods
    - Enter Proposal Budget
    - Enter Negotiation Notes
    - Create Award Information
    - Submit Proposal
  - Update Finance & Accounting offset distribution
    - Update Finance & Accounting (F&A) Rate Type
    - Enter and Post Award Budget
    - Enter and Post Expense Journal Entries
    - Incur Expenses
    - Integrate Payables
    - Integrate Journals
    - Integrate Purchasing
    - Process F&A Journal Entry
    - Journal generate F&A and F&A offset journal entry
Populated Billing Worksheet

- Create Billing invoice
- Billing to PC/CA Interface
- Billing to Projects
- Activate the contract
- Change Billing Plan to Ready

- Developed and discussed key issues in the following areas:
  - Business Processes and Features
  - Workflow
  - System Integration
  - Data Integration
  - Interfaces

- Participated and conducted configuration exercises within specified modules.
- Identified processing issues and/or gaps related to configuration exercises.
- Identified an initial list of gaps, workflows, conversions and interfaces.
- Completed detailed work plans for implementation.
- Developed a list of all tables associated with the identified modules to be implemented for base table configurations.

Vendor Relations Team

Deliverables and Tasks Completed

- Attended demonstrations of key Purchase Order and eProcurement (Self-service) functionality including:
  - Setup data
  - Requisitions
  - Purchase Orders
  - RFQ’s
  - Contracts
  - Receivers
  - Internal Service Billing

- Gathered high-level requirements within Purchasing and eProcurement to use in defining key business processes for configuration/prototyping.
- Participated in hand-on sessions of various modules within PeopleSoft.
- Participated and conducted configuration exercises within specified modules.
- Identified processing issues and/or gaps related to configuration exercises.
- Identified an initial list of gaps, workflows, conversions and interfaces.
- Completed detailed work plans for implementation.
- Developed a list of all tables associated with the identified modules to be implemented for base table configurations.

**Facilities and Property Team**

**Deliverables and Tasks Completed**

- Met with various functional teams such as Payroll, HR, Sponsored Research and University Management teams on effort reporting.
- Participated in detailed demonstrations in the following areas:
  - General Ledger Integration
  - PO Integration
  - AP Integration
  - Reporting – Tree Manager
  - Closing Assets
  - Adding transactions
- Participated in PeopleSoft tutorials and demo database inventory, projects and capital assets.
- Participated and conducted configuration exercises within specified modules.
- Identified processing issues and/or gaps related to configuration exercises.
- Developed an initial list of gaps, workflows, conversions and interfaces.
- Completed detailed work plans for implementation to specified modules with the Financial System.
- Developed a list of all tables associated with the identified modules to be implemented for base table configurations.
Human Resources /Payroll Team

Deliverables and Tasks Completed

- Attended detailed product demonstrations for Human Resources/Benefits and Payroll.
- Participated in hands-on sessions of various modules within PeopleSoft.
- Identified the base tables needed for configuration of the HR/Payroll functionality to determine the data fields that comprise the tables and to begin identifying the sources from which data is to be derived.
- Participated and conducted configuration exercises within specified modules.
- Led discussions of cross functional team meetings which consisted of the HR/Payroll, Sponsored Research, Vendor Relations, Facilities, University Management, and the IT teams.
- Identified processing issues and/or gaps related to configuration exercises.
- Identified an initial list of gaps, workflows, conversions and interfaces.
- Completed detailed work plans for implementation of HR/Payroll modules.

Student Administration Team

Deliverables and Tasks Completed

- Attended detail demonstrations in the following areas: Academic Structure, A/R, Student Accounts, Waivers, Third-Party donors, Admissions/CRM, Recruitment/Transcript evaluations, Student Records, Registration, Class Scheduling, Catalog, Financial Aid, Student Employment, Permanent Records and Degree Certification.
- Attended demonstrations on Student self-service and Workflow.
- Attended demonstrations for Student Financials that included core business processes such as Cashiering, Third Party Contract Vendors, General Ledger Interfacing.
- Identified processes for Student Financial Aid that included items such as the electronic notification to student of disbursement authorization failures.
- Identified possible interfaces include the following systems; SASS, Space/Class Management, CLAST, National Student Loan Clearinghouse, FACTS and FASTER.
- Participated in hands-on exercises of the Student Administration Module.
- Identified processing issues and/or gaps related to configuration exercises.
- Participated and conducted configuration exercises within specified modules.
- Developed an initial list of gaps, workflows, conversions and interfaces.
- Completed detailed work plans for implementation of identified modules with the PeopleSoft Student System.
- Participated in Skills on Demand PeopleSoft Demonstration Site
- Developed a list of all tables associated with the identified modules to be implemented for base table configurations.

**Information Technology Team**

**Deliverables and Tasks Completed during CRP**

- Participated in detailed discussions and overview sessions of the following:
  - PeopleTools
  - Architectures
  - Portals
  - Workflow
  - Security
- Developed the overall Technical Architecture for the PeopleSoft Hosting Environment.
- Attended two week training/overview class for PeopleTools.
- Attended discussions of the PeopleSoft’s 3-tier architecture and how each tier (Web, Application, and Data Base) work.
- Participated in demonstration of a comparison of running Payroll on DB2 database platform as opposed to running it on Oracle database platform.
- Met with PeopleSoft consultant and IT team to develop a pre-installation checklist.
- Gained knowledge on adding new users in the PeopleSoft applications with limited access to get an understanding of how it works:
  - Setup security Roles and Trees to get an understanding of how it works.
  - Setup report writer to get an understanding of the reporting process.
  - Create a workflow to get an understanding of that process.
- Identified the skill-sets needed for IT to operate the PeopleSoft applications.
- Discovered the tools to use to import data into the PeopleSoft applications and how they should be used.
Discussion of the reporting tools PeopleSoft provides and how to use each of them.

Discussed web based reporting, shared reports, third party reporting systems and the process scheduler.

Met with representatives from Sun Microsystems, Oracle, IBM who did an overview of their Server and Mainframe systems and their capabilities.

Review of Performance Sizing Whitepaper from PeopleSoft and developed a sizing document for FAMU.

Review of PeopleTools Hardware and Software Requirements.

Completed workflow/conversion/gap/interface matrix.

Provided technical support to various functional teams.

Participated and conducted configuration exercises within specified modules.

Identified processing issues and/or gaps related to configuration exercises.

Identified an initial list of gaps, workflows, conversions and interfaces.

Completed detailed work plans for implementation.

*User Training, Education and Communications Team*

**Deliverables and Tasks Completed**

- Attended demonstrations of various functional teams.
- Participated in demonstration and overview of PeopleSoft End-User Training Packages.
- Began the design and development of the FAMU ERP Official Website.
- Designed a for Training Design, Administration and Implementation Plan.
- Designed plan for moving Primary Users from current state to future state with new business processes and PeopleSoft technology.
- Designed a Communication Strategy and Plan.
- Initiated development of a Primary User Database for Financial Management, Human Resources/Payroll and Student Administration, identifying current roles and work processes.
- Began the design matrix for identifying targeted audiences, intended messages, vehicle of delivery and objectives.
- Developed work plan for rollout of the User Training, Education and Communication plans.
Future Updates and Communication

The FAMU ERP Project website is the best place to find information on the project. Please check back regularly to see what is new. If you have a specific question, please contact the project team via email: erp@famu.edu.

www.famu.edu/erp

Implementation Schedule – Go Live Dates

⇒ Financials – July 1, 2004
⇒ Human Resources and Payroll – January 2005
⇒ Student System – January 2006
Florida Universities Consortium

Enterprise Resources Planning

Infrastructure Architecture and Design
PeopleSoft provides a rich application suite designed to offer exceptional end-user functionality. However, the PeopleSoft Internet Architecture (PIA) demands a robust and scaleable computer hardware and software infrastructure to enable this functionality.

The PIA model consists of three distinct tiers that may be either physical or logical. At the front-end is a web tier that provides all communication with end-users via the Internet; in the middle is the application tier that performs the business logic; and, at the back-end is a data tier that is the repository for all application and configuration data, which populates over 20,000 tables. Each application (Financials, HR/Payroll, and Students) requires a distinct set of application and data tier instances. In addition, the PeopleSoft system support model demands several distinct copies of each application for development, testing, and upgrading etc.

The proposed infrastructure acquisitions will be accomplished in two phases. The first is the pre-production infrastructure that will provide a powerful configuration and development environment.

The front-end will consist of five IBM P630’s running AIX OS and Weblogic web services. The middle and data tiers will be hosted on an eight-way IBM P690 that accesses a 1.2 terabyte data storage device using IBM’s UDB as the data base engine. During this pre-production phase, the IBM P690 and associated data storage will be shared with FSU, providing each university four-way P690 power and 600+ gigabytes of data storage. This configuration will provide a robust environment for configuration, development, and testing and will sufficiently emulate the production configuration allowing the tuning and adjusting experience that will be crucial during the production phase.

The second phase, production, will require replacing the shared eight-way IBM P690 with our own 24-way IBM P690 and acquiring additional data storage capacity. The additional processing power will increase the UDB2 and AIX-OS licensing fees. The five IBM P630 web cluster should be adequate but can be bolstered by adding additional P630 servers if targeted access times are not reached during maximum production load.

The following diagrams graphically represent the proposed infrastructure design for both the pre-production and production configurations.
Florida A & M University
IBM Architecture & Infrastructure Design
Startup Configuration
Year 1

Web Server Farm

The IBM 4-way P-Series 630, 8GB each will run all Web servers.

IBM 4 way P-Series 690, 32GB - AIX 16 LPAR Processors all Applications Servers, Database Server and Data Warehouse

Enterprise Directory Cluster

LDAP Server

LDAP Server

Data

IBM 2105-800 Enterprise Storage Server 1.2TB, 16GB Cache, Flash Copy

File Server and Batch/Process Scheduler Server

Data Warehouse
Florida A & M University
IBM Architecture & Infrastructure Design
Production Configuration
Year 2

- Laptop computer
- Workstation
- Firewall
- Router
- Load Balancer
- Web Server Farm: The IBM 4-way P-Series 630, 8GB each will run all Web servers
- File Server and Batch/Process Scheduler Server
- Data Warehouse
- IBM 24 way P-Series 690, 32GB - AIX 16 LPAR Processors all Applications Servers, Database Server and Data Warehouse
- IBM 2105-800 Enterprise Storage Server 1.2TB, 16GB Cache, Flash Copy
- LDAP Server
- LDAP Server
- Enterprise Directory Cluster