Case Study:

Largest school district in the state of Michigan

Key Technologies & Services:

- PeopleSoft FSCM v8.4 to v9.2 Upgrade
- PeopleTools v8.49 to v8.53 Upgrade

Industry - Education

Customer Since - 2013

Awards & Affiliations

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Business Need:
Customer was running PeopleSoft FSCM 8.4 (GL, AP, AR, BI, KK, PO, ePro) which had been out of Extended support since March 2007. To stay up with current functionality and gain much needed product support for tax updates, patches and bundles. Customer decided to move forward with an upgrade to PeopleSoft FSCM 9.2 in 2013. This would give them an opportunity to eliminate unwieldy customizations, streamline workflows, and introduce more user-friendly functionality.

Scope:
The primary focus of this project was a full solution cycle upgrade of PeopleSoft FSCM v8.4 to v9.2 and PeopleTools v8.49 to v8.53. The modules to be upgraded included General Ledger, Accounts Payable, Accounts Receivable, Billing, Commitment Control, Purchasing and eProcurement. Implement Grants, Projects, Contracts, Asset Management, Strategic Sourcing and Cash Management.

Project Goals:
Implement "vanilla" (no-customizations) version of PeopleSoft FSCM 9.2.
- Maximize process automation, reduce manual steps and increase productivity.
- Implement leading practices, new functionality and workflow to increase ROI.

Challenges:
- An extremely aggressive target golive date.
- No direct upgrade path from PeopleSoft FSCM 8.4 to 9.2.
- Huge architecture changes from PeopleSoft 8.4 to 9.2.
- Customizations implemented on a piecemeal basis with little or no documentation.

The ERPA Solution:
ERPA implemented a two-step upgrade process, first from the PeopleSoft FSCM v8.4 to v9.0, and then from v9.0 to v9.2, using Oracle-recommended upgrade tools. Additionally, we utilized some of our proprietary tools to capture customer's security structures in 8.4 and revise them for 9.2 based on the client's requirements. Our detailed documentation coupled with the continuous involvement of the client's business and IT teams at every stage of the upgrade process enabled complete and timely knowledge transfer. We also conducted FSCM 9.2 previews sessions of the application to avoid any requirement gaps and to maximize the client's utilization of the new product features. ERPA team organized multiple user sessions to get customer accustomed to the new application and interface. Also, we delivered detailed and comprehensive user training programs by deploying the 'Train the Trainer' approach and utilizing Oracle UPK. Lastly we initiated a post go live stabilization phase to closely monitor the system for the firt four weeks in production.

Business Benefits:
An integrated and streamlined Financial Supply Chain Management system upgraded to PeopleSoft FSCM v9.2 that leveraged new features to reduce customizations and deliver higher performance.
- Automated functionality for Chart of Accounts Requests, Financial Reconciliations and Compliance & Controls.
- Superior Financial workflow utilizing Business Process Weaver to Configure and Simplify Business Flows.
- In-Memory Financial Position Analyzer, Allocations Analyzer, Close Analyzer and Balance Analyzer facilitating real-time visibility into the financial impact of what-if scenarios enabling optimal decision making.
- Enabled a formal Grants tracking, monitoring and reporting system that is fully integrated with Procurement and Payroll.
- The associated upgrade to People Tools v8.53 enabled features like Secure Enterprise Search, Pivot Grids, Embedded Help, Life Cycle Management, Work Centers and Dashboards.