



# Case Study:

One of the largest 501C Nonprofit Power Cooperatives in the Midwest

## Key Technologies & Services:

- PeopleSoft FSCM v9.0 to v9.2 Upgrade
- PeopleTools v8.4 to v8.53 Upgrade
- Oracle 11g to 12g Database

## Industry - Power & Energy



Customer Since - 2014

## Awards & Affiliations



## Contact

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### Business Need:

Customer was running PeopleSoft FSCM 9.0 (GL, AP, AR, AM, EX, BI, PO, ePro, INV, eSup, SS and TR) which was going off extended support in June 2015. To stay current with functionality and to maintain product support for tax updates, patches and bundles, customer decided to move forward with an upgrade to PeopleSoft FSCM 9.2 in 2014. This would give them an opportunity to eliminate unwieldy customizations, streamline workflows, and introduce more user-friendly functionality.

### Challenges:

- An extremely aggressive target go-live date.
- Customizations implemented with little or no documentation.
- An incomplete set of combo-edits

### The ERPA Solution:

ERPA implemented a one-step upgrade process from PeopleSoft FSCM version 9.0 to version 9.2, using Oracle recommended upgrade tools. ERPA reviewed all aspects of customer's operational systems, legacy customization, business processes, and focused on new/improved elements available in version 9.2. Features/functions operational in 9.0. Customer production were upgraded to their corresponding components in version 9.2. 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. ERPA team organized multiple user sessions to get customer accustomed to the new application and interface. Effective knowledge transfer allowed for a minimal post-live support period saving customer significant additional expense. Lastly, we initiated a post go live stabilization phase to closely monitor the system for the first four weeks in production.

ENVIRONMENT: PeopleSoft FSCM 9.0 Upgrade to 9.2; PeopleTools 8.4; Oracle 11g.

### 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.
- Workflow review improved highly manual effort for expenses. Two key areas that were improved are:
  - Direct Debits for Employee Expense Reimburses
  - Cash Advances
- Complete re-implementation of PO workflow to streamline the approval process.

### Scope:

The primary focus of this project was a full solution cycle upgrade of PeopleSoft FSCM v9.0 to v9.2 including new/updated functionality in the FSCM area including:

- Creation and configuration of revised combo-edit scheme and associated rules.
- Better integration with ALM customizations.
- Integrate Inventory with Mobile for better use of reorder, replenishment, and other features to enhance the user experience and improve Customer productivity.
- Improve functionality for both customer and Suppliers with utilization of on-line Sourcing Events within Strategic Sourcing/eSupplier.

- Improved the structure and utilization of combo-edits and other key processes resulting in the creation and configuration of revised combo-edit scheme and associated rules that eliminated hundreds of hours of re-work of incorrectly coded accounting lines.
- Significant improvements to Accounts Payable utilizing 9.2 delivered functionality including: Auto processing of Garnishments, Voucher Mass Maintenance, Supplier Approval Workflow, Supplier/ Customer Netting, AR Refunds and Work Centers.
- Reduced and retro-fit customizations in the inventory area to ensure operability within FSCM.

## Why ERPA?

500+  
Employees

1500+  
Projects

99%  
Customer  
Satisfaction

