The People Behind the Project

Any project, no matter how small or large, is only as effective as the people who make it work.

Project Enterprise, charged with the implementation of PeopleSoft®’s software, is no exception. The people behind PeopleSoft in the University of Maine System are a resourceful bunch of professionals who devote their working hours—at the very least—to designing, fit/gapping, writing business processes, troubleshooting, preparing training materials and teaching classes, serving as SMEs, and doing the myriad other tasks necessary to take this new administrative computing software system from plan to reality.

In addition to the “basic” Project Enterprise team (in Bangor and in Orono), there are many more people out there—at every UMS campus—working as liaisons, providing input, assisting with implementations, learning new procedures, training their colleagues, answering questions, and on and on. These folks need to be recognized for their unflagging efforts. So…recognize anyone?

Vocabulary Builder:

**SME**

A SME (pronounced “smee”) is a Subject Matter Expert—a specialist with expertise in a specific area. An example: **Jonathan Henry**, formerly Director of Admissions at UMaine and at UMM, is Project Enterprise’s full-time SME for Admissions, and works with the design team on all admissions-related areas of PeopleSoft.

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**Greg Patterson** is one of several consultants assisting the local Project Enterprise team with software implementation. Greg has led University of Maine System employees in developing the Campus Community and the Admissions & Recruitment segments of Student Administration. He’ll also guide us through Student Records and Transfer Credit. During his non-consulting hours, Greg likes to garden and play golf at home in Charlotte, North Carolina.

**Tammy Light** and **Janet Boucouvalis** from UMaine (front row, L-R), **Steve Rand** and **Jon Barker** from USM (second row, L-R) and **Pam Ford-Taylor** from UMA (back row) attended Campus Community and Admissions & Recruitment fit-gap sessions in Bangor three days a week for four months. The fit/gap process looks at PeopleSoft to determine what “fits” with the way we do business, and where the “gaps” are between our ways and how PeopleSoft works. The fit/gap specialists then determine whether the gaps can be filled by changes in how we do things, or whether minor software modifications are needed. It’s a challenge!
A Peek A Week…or at least every now and then

Fortunately, or unfortunately, depending upon one’s point of view, implementation of PeopleSoft’s Financials module has been changed from next month to April 4, 2005. While preparing for go-live, we’ve also been busy preparing “A Peek A Week.” These snippets of Financials-related information will introduce end-users to some of the screens and information that we’ll be working with when Financials becomes real. Check the website from time to time to see “A Peek A Week.” Go to http://www.maine.edu/peoplesoft and click on the “News” link to the current Peek. If there is no link to a new Peek, a link to the Peek archives can be found on the “Financials” page.

News from Human Resources…

PeopleSoft’s Position Management tool was implemented on October 27, 2004. This allows institutions of the University of Maine System to maintain information on every authorized employment position on campus, and funds committed for that position, regardless of whether the position is filled or vacant. We can now track positions in addition to tracking employees. Maintenance of Position Management is a shared responsibility, with both budget and human resources offices involved. For more about Position Management, visit the Project Enterprise website.

It’s now year-end: be sure that the mailing address for your W2 form is correct. (From the PeopleSoft portal, click on Employee Self-Service, then on Maintain Personal Information, then Home/Mailing Addresses.) Also, check on how many vacation and sick leave hours you have earned. (From Employee Self-Service, go to View Checks & History, then Leave Balances.) Could be handy as you plan whether you need to use up some vacation hours before December 31!

…from Student Administration

Because Financial Management will be implemented in April 2005, because we can’t implement both Financial Management and Student Administration simultaneously (and retain everyone’s sanity), and because more work remains to be done on “back-office” processes in Student Administration, go-live of the Campus Community and Admissions segments is now planned for spring of 2006.

Fit/gap for Admissions concluded in early November, and Project Enterprise staff and consultants are now writing business processes for Campus Community and Admissions. The fit/gap team will continue to meet for two days every other week to review and approve the processes. Throughout the entire project, right up until go-live, the team and staff will be carefully refining and testing all the data that have to be converted from ISIS to PeopleSoft. There’s never a dull moment for the Student Administration team!

…and from Financial Management

The big news from Financials, of course, is that training is truly just around the corner. By now many of you have probably attended a session of “How Business Will Change” and those of you who are involved in the financial doings of the University System are eagerly anticipating the next step in your training. For more about training plans, classes, and schedules, see page 3.
When Will I Be Trained? Part II

Before the PeopleSoft Financials module is implemented on April 4, 2005, a heap of end-users need hands-on training, and you may be one of them. Here’s the latest scoop from the Project Enterprise training team. Train-the-Trainer sessions are taking place this month and in early January. Once they are trained themselves, the Trainers will be ready to hit the ground running.

If you need to be trained in any financials-related area, you already have been or soon will be contacted by your campus Training and Communications Coordinator and registered for the appropriate class(es). Classes for end-users will be held in February and March of 2005. If you have any questions about training or if, by late January, you haven’t been invited to a class that you think you need, you should communicate with your Coordinator.

Classes to be offered will cover these topics:

Using the GL Inquiry Pages
Online Journal Entry, Editing and Submitting
Journal Entry using Excel
Journal Entry Approval
Requisitions and Receiving
Approving Requisitions
Using e-Marketplace
Campus Purchasing and Payables Administration
Vendor Creation and Maintenance

For a list of all campus Training and Communications Coordinators, go to the Newsletter archives on the Project Enterprise website (http://www.maine.edu/peoplesoft/news/index/html) and check the September 2004 issue of Employee Update.

Names in the News

John Sponaugle, Director of Project Enterprise since February 2002, resigned effective November 5, 2004, to pursue consulting opportunities. Cindy Mitchell was named Interim Director of Project Enterprise. Eloise Kleban has assumed the responsibility of Training Coordinator for the Project. Linda Reid has joined the training team on a part-time basis.

A PROJECT GLOSSARY

Business Unit: A required five-digit PeopleSoft ChartField. Each University is a Business Unit.

Component: A group of related PeopleSoft pages.

PO Voucher: A transaction created to pay an invoice related to a purchase order.

Voucher: A PeopleSoft process to pay a vendor directly.

Workflow: The automation of a PeopleSoft business process (e.g. Journal approval) that passes work from one participant in the process to the next. Rules are set up that determine Workflow paths.

Worklist: Automated to-do list created by Workflow, Worklist is a tool that enables you to view tasks requiring your attention. The PeopleSoft system sends email to you when a new task has been added to your Worklist.

Dear AIM,

“I’m hearing about “expenses” in PeopleSoft. What’s that, and what does it mean for me? I travel frequently on university business. Signed, Always in Motion

Dear AIM,

“Travel and Expenses” in PeopleSoft means a self-service feature for processing reimbursements to employees for travel and some other expenses. It will be implemented in April but, initially, the self-service travel expense entry feature will be available only at System-wide Services. At the other campuses, one or two individuals will be trained to enter your summarized travel information into Travel and Expenses (as they do today). Down the road a bit (so to speak) after the self-service component has been well-exercised, we’ll implement it at all other campuses. As you can imagine, lots of people will need to be trained in how to enter their requests for reimbursement. Thanks for writing. Stay in touch.
Are you paid monthly (and are not faculty)?

You must enter your vacation time into PeopleSoft and get your supervisor’s approval by **Wednesday, December 22**. Be sure to enter all time you plan to take during the month.

Remember: Any vacation hours you have earned over the maximum 320 hours WILL NOT carry over into the new calendar year. If you haven’t used them by December 31, you will lose them!

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Are you paid bi-weekly?

You must enter your elapsed time into PeopleSoft and have it approved by your supervisor by **Friday, December 17** for the pay period December 5 through December 18. Otherwise, your paycheck won’t be ready for you on December 23.

Remember: Any vacation hours you have earned over the allowed maximum (240 if you have 12 or fewer years of service or 320 hours if you have more than 12) WILL NOT carry over into the new calendar year. If you haven’t used them by December 31, you will lose them!

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Are you a student employee?

You must enter your punch time into PeopleSoft by **Wednesday, December 22** for your supervisor’s approval. Otherwise, your paycheck won’t be ready for you on December 30.

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