“The times, they are a’ changin’”

Bob Dylan had it right. Times in the University of Maine System are changing...soon. This spring, we undergo training to prepare ourselves for The Big Day: July 5, 2005, when PeopleSoft®’s Financial Management module goes live.

This particular change might be an especially stressful one for many of us.

It’s hard to say goodbye to old, familiar ways of doing things, and it’s hard to move forward when we don’t know exactly what we’re moving to. If you’re feeling a little bit (or a lot!) nervous and uncertain about this implementation, know that you’re not alone.

There are ways to combat the uncertainty, nervousness, and stress. Read on:

When you use Financial Management in PeopleSoft, you’ll find that you need to be handy with your computer’s mouse. If you are intimidated by the mysteries of the mouse, now is the time to get some mouse handling practice.

While you’re at it, spend some time familiarizing yourself with the web in general, since—as you probably know from accessing your personal data in Human Resources—PeopleSoft is web-based software. If you need help with any of this, ask the technical support person in your department (if there is one), or your campus computing help center.

After you have attended a training session, you’ll be allowed to play in the Sandbox. Do it! The more you practice your real-life functions in a “supervised” environment, the more comfortable you’ll be with your job tasks at the time of go-live.

Get together with colleagues for a brown-bag lunch and talk about what you’ve learned. Everybody benefits.

Get away from your computer screen from time to time. We all know that sometimes it’s hard to leave when we’re on a roll, but take advantage of your break times to give your brain, eyes, and muscles a rest.

Try to keep your sense of humor. Laughter can help to reduce your stress levels and clear your head.

However, if you’re really feeling the stress of change, you may need (as Emeril would say) to “kick it up a notch!” Take care of yourself. Consider:

- An energizing workout at the gym.
- A relaxing session with a massage therapist.
- Some quiet time with a good book or movie.
- A brisk walk early in the morning or after lunch.
- Trying something new: perhaps meditation or yoga.

And if none of the above does it for you, call for help. If your concerns mostly relate to specifics about the Financials implementation, please call on your campus Training and Communications Coordinator. A list of these people can be found on the Project Enterprise website (www.maine.edu/peoplesoft/train/taccteamlist.html).

If your worries are more generalized and affecting your ability to cope, please call your campus EAP (Employee Assistance Program) office. At UMaine, dial 581-4014. On other campuses call the System EAP number (1-877-622-4327). You’ll find kind people there who have access to all sorts of resources to help you. Don’t suffer in silence.

Finally: This is a wonderful opportunity for us to keep current with the skills needed for today’s workplace—in the University of Maine System or elsewhere. Let’s take advantage of it.
**Be a Star!**

**Accept a “Role” in PeopleSoft**

If you’ve looked at the Project Glossary on the Project Enterprise website (www.maine.edu/peoplesoft) or articles about the implementation of Financial Management in past issues of this newsletter, you have likely come across the term **role**. As in “Once you’ve been trained for a specific role or in a particular financial process….” While we can’t promise fame and fortune if you are given one of these roles, we can at least tell you what they are.

In “PeopleSpeak” a role is a set of job responsibilities tied to a specific set of processes that define how those responsibilities should be carried out. For example, a person with the “Requisitioner” role creates requisitions. Pretty straightforward, yes?

An employee is not limited to just one role; your job responsibilities may require that you are assigned one, two, or even more roles. Here are the other roles that have been identified for use in PeopleSoft’s Financial Management system.

**Roles in the category of Purchasing/Payables are (the envelope, please):**

- ★Requisitioner: Creates requisitions.

- ★Receiver: Will record the receipt of goods online. Will help resolve problems between requisition and invoicing when discrepancies arise.

- ★Requisition Approver: Uses PeopleSoft pages to approve requisitions that are over the Requisitioner’s self-approval limit.

- ★Payables: Enters and maintains vouchers into PeopleSoft.

- ★Inquiry: Views purchasing and accounts payable information screens but cannot update any information.

- ★Campus Administration Purchasing/Payables User: Performs the tasks for each institution that are not distributed, such as creating vendors, maintaining vendor data, manually sourcing requisitions, creating express purchase orders, and processing purchase orders.

- ★Vendor Creation: Creates vendors in PeopleSoft.

- ★Vendor Maintenance: Changes vendor information in PeopleSoft.

- ★RFQ: After go-live in July, users in this role will be trained in “Request for Quote.”

**Roles in the category of General Ledger are:**

- ★Journal Entry: Uses PeopleSoft pages to enter, edit, and submit journal entries. Will also have ability to use PeopleSoft-delivered Excel interface to create journal entries.

- ★Journal Approval: Uses PeopleSoft pages to approve and mark for post or deny journal entries submitted through Excel or online.


- ★Campus Accounting: Posts journal entries and imports journal entries from Excel journal creation.

**Roles in the category of Expenses are:**

- ★Expenses Entry (one or two roles per university): Enters summarized travel and expense data into PeopleSoft for employees needing reimbursement for travel or other expenses.

- ★Expenses Self-Service: Enters own expense data into PeopleSoft. At go-live in July, only SWS employees will be assigned this role to pilot self-service functions.

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Employee Update” is published by Project Enterprise in the University of Maine System, and is prepared by Eddie Meisner, Communications Coordinator. She can be reached at 207-561-3302 or meisner@maine.edu and welcomes your comments.

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The People Behind the Project

(L-R) Sharon Nadeau, Director of Business Systems at the University of Maine at Farmington, focuses on the computer screen as Janet Warnert, General Ledger SME at Project Enterprise, points out some details at a train-the-trainer session for Campus Training and Communications Coordinators held at the University of Maine in December. Tom Potter, Chief Financial Officer at the University of Maine at Machias, is at work in the background. (A list of Coordinators is available at www.maine.edu/peoplesoft/train/taccteamlist.html)

(Standing) Robin Shaler, Trainer at Project Enterprise, works with Tamara Mitchell, Executive Director of Human Resources, Affirmative Action, and Business Services from the University of Maine at Fort Kent, and Laurie Gardner, Director of Personnel and Assistant to the Vice President at UMF, at the training session.

Campus Training and Communications Coordinators are responsible for ensuring that employees on their campuses are trained in their assigned roles (see page 2) before PeopleSoft's Financial Management is implemented in July. Classes for nearly 2,000 employees System-wide are now in progress.

Looking for something? If you have questions about things related to the implementation of PeopleSoft modules, be sure to visit the Project Enterprise website at http://www.maine.edu/peoplesoft. There you’ll find background information, an updated timeline, training schedules and materials, the Project Glossary, archives of this newsletter, useful tidbits of financials-related information on the “A Peek A Week” pages, and more.

A PROJECT GLOSSARY

**Journal Entry:** A PeopleSoft accounting entry entered online, or input from a feeder system (payables, receivables, asset management, and so on) to the general ledger. Replaces what were called Journal Vouchers in FAST system. Journal Entry in PeopleSoft can be done online in PeopleSoft Financials or through PeopleSoft-provided Excel spreadsheets.

**Reference:** Allows each line of a Journal Entry to refer back to a document, person, invoice, or other piece of information helpful in tracking the source of the Journal Entry line. Consists of up to ten alpha/numeric characters.

**Reference Number:** Located on Journal Entry header. Enables originator to refer the Journal Entry back to a document, person, invoice, or other piece of information helpful in tracking the source of the Journal Entry. Consists of up to eight alpha/numeric characters.

**Sandbox:** A practice system available to end-users who have undergone training in the financials area. Allows practice of real-life functions in a supervised environment.
The Timeline

The focus of the past few issues of Employee Update has been on Financial Management, given the upcoming implementation of that PeopleSoft module. However, work on Student Administration Services is definitely in progress, and you’ll see more information about happenings in the student services area in future issues of Update. The Campus Community and Admissions & Recruitment segments will be implemented in May of 2006, so hang on…next year at this time we’ll be up to our elbows in and ready to go live with the first bits of Student Administration.

Visit the Project Enterprise timeline on our website for more information about what’s planned and for when.

Dear Project Enterprise,

When PeopleSoft’s Financial Management is implemented in July, will everyone be doing everything on the computer? Won’t anyone use paper forms for ANYTHING? Signed, Maybe We Can Save Some Trees

Dear SST,

Actually, there will still be a need for us to have some paper forms available. Not everyone who needs to request goods or services, for example, will always have access to the computerized system. We’ll have paper available for check requests, requisitions, and for any other function needed by people without PeopleSoft access. So don’t throw away your pencil just yet. Thanks for writing. Stay in touch.

When Will I Be Trained? Part IV

All UMS institutions have scheduled training classes for financials users, and many sessions are taking place this month. Your Training and Communications Coordinator can provide detailed information about training on your campus. See www.maine.edu/peoplesoft/ train/taccteamlist.html for a list of Coordinators.

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