



ALL ABOUT PURCHASING!

When PeopleSoft®'s Financial Management module is implemented this spring, financial life as we have known it in the University of Maine System will change. New terms must be learned, along with new procedures and new ways of thinking about how we conduct business. We've all had an opportunity to attend a session of "How Business Will Change," but we still have lots of questions. This special issue of **Employee Update** focuses on the changes in **Purchasing**. We'll try to anticipate and answer some of the questions that may be on your mind.



Is purchasing being centralized? If so, why? What's the benefit?

Yes, the procurement function is being centralized to some degree; this allows us to pool our resources System-wide to get better contracts and save money. If we all are buying the same things from the same place, vendors are much more inclined to give us a better deal. You will still be making your regular day-to-day purchases at your campus, though.



"There's probably \$20 to \$40 billion in costs that can be cut from higher ed through supporting preferred vendor contracts, reduction of maverick spending, higher and more uniform quality and processes, electronic commerce and e-business, and through collaboration with other colleges." Tom Fitzgerald of the Educational and Institutional Cooperative (of which UMS is a member)



What is "strategic procurement" all about? Please explain.

The new centralized purchasing department is called the Department of Strategic Procurement. The University System is moving away from transaction-based purchasing to a

One of the first places you'll notice our centralized purchasing effort is in the purchase of computers and related products. We'll have a direct link to the Computer Connection website for all computer-related needs. Soon, we'll have a links to our office supply contract and scientific materials contract, and more and more contracts will be added as time goes on. Stay tuned!

system in which campuses, thus goods and services.



website (to be use. The University

saves money in two ways: lower prices, and less time spent "shopping." We can go to eMarketPlace, find what we're looking for on a University-negotiated contract, and order it.

long-term contracts are obtained for all reducing the effort required to obtain These contracts will be available on a called eMarketPlace) for everyone to



What else will this new centralized department do?

The Department of Strategic PeopleSoft software modules for Payable—answering users'



Procurement will manage the Purchasing and Accounts questions, solving oversee the PeopleSoft beginning with the

problems, and training new users as we go forward. It will also Travel and Expenses module, which will be implemented over time,

Change is good!

"Change is as inexorable as time, yet nothing meets with more resistance." **Benjamin Disraeli**

Speaking of procurement (see previous page) and change (see above quotations)...by now we all know that Oracle procured PeopleSoft in December 2004. We can anticipate change as the two companies merge, but because we cannot predict the future (darn), we don't yet know how the merger will affect the University of Maine System. Fortunately for us, however, we already have excellent ongoing relationships with both Oracle and PeopleSoft. Our contract with PeopleSoft/Oracle remains in effect and honored by both parties. We will continue with our planned implementation schedule for all PeopleSoft modules. We will also continue to educate end-users as information about the merger's impact on the University System becomes available.

"The only person who is educated is the one who has learned how to learn...and change." **Carl Rogers**



When Will I Be Trained? Part III

By now you have been enrolled in (and perhaps have already taken) whatever training class(es) you require for your job responsibilities in the area of purchasing.

The Project Enterprise training team conducted train-the-trainer sessions in December and January. Campus trainers are now equipped to deliver training to end-users in requisitions and receiving.


If you have questions about your training, contact your campus Training and Communications Coordinator. Visit www.maine.edu/peoplesoft/pdf/sept04news.pdf for a list of Coordinators.

ALL ABOUT PURCHASING

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University of Maine System office. (See *Employee Update*, December 2004, for more information about this module.) The Department will work with the UMS IT Planning and Policy Committee to establish System-wide standards, where appropriate, for computer equipment. Such common standards will enhance our ability to get better pricing, thus lowering each University's total cost of ownership. Eventually, the Department will also maintain software licenses, freeing each campus from that management task.

? Will we still be able to use our Purchasing Cards?

Absolutely! This is  one of the most efficient methods of procurement. The centralized office will be involved with PCards, helping campuses to manage their PCard programs.

? What are some of the features that we'll have with PeopleSoft software that we haven't had in the past?

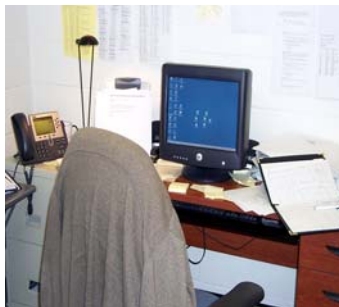
The biggest benefit is **INFORMATION!** More information about your purchases than you've ever had in the past. You'll be able to check, right from your computer, the status of your requisition. Has it been approved? What's the purchase order number? Has it been invoiced? Have we received the items?



In addition, we are building interfaces for many campus functions: this means no more double entry for library, bookstore, and technology invoices. We'll also have interfaces with Facilities' work order system to produce purchase orders. All of these enhancements will allow employees the freedom to concentrate on work other than data entry. ↪

The People Behind the Project: Purchasing

Jean Meakin (right), Director of Purchasing at The University of Maine since 1988, began working with the Project Enterprise team in 2003 as Director of Strategic Procurement for the University of Maine System. Jean is the subject matter expert (SME) for the purchasing segment of Financial Management.



Jeff Joy (left) is the subject matter expert for the Accounts Payable segment of Financial Management, and will be the Procurement Systems Analyst in the new Department of Strategic Procurement. He has worked for the University System since 1989. (Jeff says this is one of his better pictures.)

Eloise Kleban (right) is coordinator of the Project Enterprise Training Team. In December, Eloise led train-the-trainer sessions for campus trainers in requisitions and receiving. This semester, she is training end-users in requisitions and receiving, approving requisitions, and AP/PO. Eloise joined the Project Enterprise team part-time in February 2004. She has worked at UNET in Orono for 25 years.



A PROJECT GLOSSARY: Some Purchasing Terms

Inquiry Role: People assigned this role will be able to view requisition, purchase order, invoice, and receiving data.

Three-Way Match: The invoice, purchase order, and receiving information all match in PeopleSoft's Accounts Payable.

Match Exception: The purchase order, invoice, and receiving information do not match when the matching process is run.

Match Manager: In PeopleSoft Accounts Payable, this page allows the user to view and take action on any match exceptions.

Speedchart: A template used to automatically enter distribution lines (how you want an expense divided among particular ChartField Combinations) in PeopleSoft's Accounts Payable.

For more of "A Project Glossary," visit <http://www.maine.edu/peoplesoft>



Maine's
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**BREAKING NEWS: GO-LIVE
OF FINANCIAL MANAGEMENT
IS POSTPONED**

An assessment of our readiness to implement Phase I of the Financial Management module has determined that we can better assure a more stable and successful go-live by delaying from April 4 until **July 5, 2005**. The July implementation date will:

- ✓ allow end-users time to complete 2005 year-end financial tasks using the familiar, current FAST system
- ✓ provide sufficient opportunity for the new system to be thoroughly tested
- ✓ ensure that all end-users are properly trained and able to practice in a supervised environment prior to implementation
- ✓ allow time for the project team members to determine that financial processes work properly
- ✓ ensure the highest quality final product for the University of Maine System.

You'll be hearing more about revised training schedules from your Training and Communications Coordinator.

Dear Project Enterprise, 

*Once I've been to my training session, I just know I'm going to need to practice entering requisitions so I don't forget what I've learned before the new system is implemented. How can I do that?
Signed, I Must Practice*

Dear IMP,


Glad you asked. After you have completed training for whatever role(s) you are assigned in PeopleSoft's Financial Management module, you get to play in the sandbox!

Yes, it's true. Once you've been trained for a specific role or in a particular financial process, you will have access to the practice "sandbox" in PeopleSoft. You'll be able to log in as yourself and practice real-life functions—though you'll be using made-up data. You can go through all of the steps required to complete your actual tasks in a "supervised" environment that doesn't affect your real work.

Your training coordinator will provide you with the information you'll need to find and get into the sandbox. One of the first things you and all other **Requisitioners should** do when you enter the sandbox is **check your "ship to" address** and make sure it is correct. If you need to add, change, or delete a "ship to" address, your trainer can show you how.

Have fun!



Thanks for writing. Stay in touch. 

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