Dear Colleagues,

The Project Enterprise team has been hard at work for months preparing for implementation of the Financials module of the PeopleSoft® system. Many, many hours of meticulous planning and development work by the technical team and trainers, with input from University of Maine System personnel, will result in a product that is carefully designed to meet our needs now and into the future.

Our original timeline called for this implementation to occur on January 1, 2005. Despite our very best efforts to meet our targeted deadlines, we recognize that we need more time to ensure a successful, smooth, and effective transition to the Financial Management module. Thus, we have moved the go-live date for Financials from January 1 to April 4, 2005. The additional three months of development and testing time will allow the technical team to provide a skillfully designed and valid product, and will also enable the training team to construct more accurate, detailed, and up-to-date materials for use by campus trainers.

We are aware, however, that while this change may be a bit of a relief to some, it is a cause for concern for others who favored the January implementation. We acknowledge that there is no perfect date for this go-live to occur. Having said that, we also acknowledge that the additional three months will allow us to better prepare for this long-planned event. Implementation of a new Financial Management system means that we are all faced with the somewhat daunting task of learning new procedures, new ways of thinking about our old financial processes, and a new Chart of Accounts, among other things. Change of this magnitude can be difficult for many of us. Preparing for this changeover may increase pressures on our time, patience, and collegiality. It is particularly important that we show respect for and sensitivity to others as we all work together to accomplish our goal of a smooth transition to the new software.

Training for the Financials implementation began in August and will continue both on the campuses and centrally throughout the fall and spring semesters. Not everyone will require training on specific financials-related tasks. If you need training, you will be, or already have been, invited to the class(es) necessary for your job responsibilities. Regardless of the level of training you need, I urge everyone in the University of Maine System to attend a session of “How Business Will Change.” This class provides an overview of the new Financials system, and will give you an understanding of the magnitude of change we are undergoing.

Thank you for your continuing support as we work together on this exciting and challenging project.

Sincerely,

Joanne L. Yestramski
Chief Financial Officer
The New Name

In May, we announced that the “ERP/PeopleSoft Project” was going to be re-christened with a new name. In July, we became Project Enterprise. We know that the names “ERP (Enterprise Resource Planning)” and “PeopleSoft” have been around for several years, and we know that it’s hard to change the name of an ongoing project, but we’re going to try.

The University of Maine System has purchased a product from the PeopleSoft® company. That product—software—has become integrated into the overall project (enterprise resource planning), and that project is now integrated into the life of the University of Maine System. Referring to this entire undertaking as the “PeopleSoft Project,” while in a way technically correct, usurps another organization’s name and is really too narrow a title for this effort.

So our multi-year, multi-faceted project is now known as Project Enterprise: Connecting People & Information.

You’ll be seeing our new name and logo on this newsletter, on our website (still www.maine.edu/peoplesoft), on training materials, and on any other documents that issue from the Project Enterprise offices.

Thank you for joining the Project Enterprise team in adopting and using our new name.

What’s Up With Student Administration?

Planning for implementation of PeopleSoft®’s Student Administration module is right on schedule. Recall that Student Administration consists of eight segments (Academic Structure, Campus Community, Admissions & Recruitment, Student Records, Student Financials, Academic Advisement, Financial Aid, and Contributor Relations).

Last winter and spring, the basic Academic Structure was hammered out. This past summer, the Campus Community fit/gap team members worked in Bangor three days a week…then returned to their home campuses to get their regular work done. Some of this team’s accomplishments:

- Set up biodemographic data (all the usual name, address, birthdate fields as well as extras like immunization, residency, and extracurricular activities).
- Set up a powerful communications management system called the “3C’s” (for “Communication, Checklists, and Comments”). This neat feature will help us track incoming and outgoing correspondence, emails, and phone calls, and we can also attach comments like “sticky notes” to student files.

The team will wrap up Campus Community this month and next, and move into fit/gap for Admissions & Recruitment. In November and December, they’ll begin work on processes (step-by-step “how to do” various tasks), and in January will begin testing the setup and processes they’ve spent all these months developing.

Before we know it, the background work will be complete, and then training will begin.

Wondering how the Financials implementation will affect you? Be sure to attend a session of “How Business Will Change.” Check with your Training and Communications Coordinator for times. See page 3.
When Will I Be Trained?

End-users at each University of Maine System institution need to be trained on various aspects of the PeopleSoft® Financial Management system before go-live on April 4, 2005. More than 1,600 employees who need training have been identified! The Training and Communications Coordinators at each campus are working during the fall semester locating space for classes, and trainers are being trained to deliver specific classes locally. You will be invited to the classes appropriate for your job responsibilities.

The latest draft of the “PeopleSoft Financials Phase I Implementation End-User Training Plan” is available on the Project Enterprise website (www.maine.edu/peoplesoft/train/index.html). Check the plan to see what courses are scheduled for which user groups. Everyone should take “How Business Will Change.” Check with your local Coordinator for times and locations if you haven’t already been invited.

Classes in Requisitions and Receiving and in Vendor Creation and Maintenance will begin in early 2005, followed by instruction in various aspects of Journal Entry, in Requisitions and Receiving, in Approving Requisitions, in e-Commerce, and in GL Inquiry Pages.

### A PROJECT GLOSSARY

**Chart of Accounts:** Foundation of an accounting system. The PeopleSoft® Chart of Accounts consists of information fields that provide the basic structure for financial transactions.

**ChartField:** Component within PeopleSoft’s Chart of Accounts. Each ChartField provides key information related to a financial transaction. Eight primary ChartFields are used by the Financials system.

**ChartField Combinations:** ChartFields joined together in various combinations to tell the system specifically where to record financial transactions.

**FAST to GL Translate Tool:** Will provide appropriate ChartField Combination to replace existing FAST account.

**GL Inquiry Pages:** UMS-built tool that will replace WebFA$T. Will provide option to print reports and transfer output to Excel.

“How Business Will Change”: A class offered to all UMS employees; provides an overview of the new Financials system, including introduction to the Chart of Accounts and ChartFields in the PeopleSoft system. Highly recommended viewing.

For more of “A Project Glossary,” visit www.maine.edu/peoplesoft/
**Dear Project Enterprise,**

What, exactly, are the benefits of this new PeopleSoft® Financials system? It seems like a lot of hassle and expense.  
Signed, Curious and Concerned

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**Dear C and C,**

Well, you’re right. It is a lot of hassle and expense, at least at the outset. However, we’ll see many benefits with this new system. To name a few:

- ✓ Our current computer systems are old, no longer maintained or supported by the vendors who sold them, and are running on hardware that is fast becoming obsolete. We can’t depend on them much longer. They **must** be replaced.
- ✓ PeopleSoft will allow us to collect more—and more valid—data. If you make a mistake entering something, you can easily fix it—eliminating “garbage in, garbage out.”
- ✓ We’ll reduce the need for the same data to be entered multiple times into multiple systems—because PeopleSoft is the system.
- ✓ We’ll be able to generate better and easier-to-understand financial reports, and can put them into current desktop tools like Excel.

Once we’ve all been trained to use the new PeopleSoft system, we won’t find it any more of a hassle than the systems we’re using now. Yes, it’ll be a big change, but it is a change both worthwhile and long overdue! Thanks for writing.

Stay in touch. ☹

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