

## The Client: Undisclosed Transportation District

### Business Need:

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Client is a public transport agency that provides bus service and also operates commuter shuttles to stations and community shuttles. Its 49 routes brings over 50,000 daily riders.

In 2014-2016, our client wanted to re-implement their PeopleSoft software to version 9.1 for their Financials (FIN), and HR (HCM) applications, and finally implement the Grants Suite offered within PeopleSoft. It was determined that the Upgrade/re-implementation would be done in several phases. Initially Upgrade and Assess Existing Processes and Align them to streamlined PeopleSoft Best Practices, thereby eliminating custom and manual processes. This included custom processes both in Financials and HR. Workflow and Approvals. After the Upgrades to FIN & HCM PeopleSoft Pillars, Fully Assess and Implement the Grants Suite within PeopleSoft 9.1. Key areas of focus were commitment control, tracking expenses for projects supported by multiple sources of funding etc. Workflow was converted to the newer PeopleSoft AWE Architecture where possible and within scope. Afterwards the Grants Project Contract Billing and AR Processes were completed with full Commitment Control Integration. Asset Management Process Integration to Project Costing for Capital Improvement Projects was considered in the Roadmap.

### Our Role:

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- ✓ Lead assessment for the PeopleSoft 9.1 Upgrade/re-implementation
- ✓ Assessment and Roadmap Future State,
- ✓ Upgrade/re-implement and
- ✓ Post Go Live Support.

### Project Objectives:

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#### FIN Objectives:

- ✓ Review Manual and Custom Business Processes
- ✓ Align Business Processes to Delivered PeopleSoft Solution
- ✓ Eliminate Custom Business Processes
- ✓ Determine Streamlined Processes within Upgrade Scope
- ✓ Roadmap Processes out of Upgrade Scope for Future State
- ✓ Specific focus on Commitment Control Integration to ensure Budgeted Spending
- ✓ Prepare for upgrade
- ✓ Implement PeopleSoft Upgrades to version 9.1
- ✓ Provide Training Manuals and Online Training Options

- ✓ Post Go Live Support

**HCM Objectives:**

- ✓ Review Custom Business Processes
- ✓ Align Business Processes to Delivered PeopleSoft Solution within Scope
- ✓ Eliminate Custom Business Processes within Scope
- ✓ Determine Streamlined Processes within Upgrade Scope
- ✓ Integration to Time Keeping System
- ✓ Roadmap Processes out of Upgrade Scope for Future State

**Grants Suite Implementation Phase Objectives:**

- ✓ Review Manual and Shadow System Grants Business Processes
- ✓ Propose an end to end Implementation Solution for Grants Post Award Business Processes
- ✓ Align Grants Post Award Business Processes to Delivered PeopleSoft Solution
- ✓ Integrate Grants into the Commitment Control Chartfield Accounting String
- ✓ Prepare for Implementation
- ✓ Implement PeopleSoft Grants Suite
- ✓ Post Go Live Support
- ✓ Phase out Manual Grant Processes outside of the PeopleSoft Solution

**Our Solution:**

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The assessment focused on reviewing processes including those that were custom or manual, resources including people, and technology.

**Major Business Process Areas:**

- ✓ AP/Requisitions/Purchase Orders
- ✓ eSuite Procurement Modules
- ✓ Travel and Expense Integration
- ✓ Workflow Approvals
- ✓ Interfaces
- ✓ Roles/Workflow/Security
- ✓ Commitment Control Budgeting
- ✓ Grant Project Contract Billing AR Implementation
- ✓ Historical Grant Year Phase Out
- ✓ Complete Integration to PeopleSoft FIN Modules & PeopleSoft HCM Labor
- ✓ Billing / AR / Cash Receipt & Application
- ✓ Asset Life Management
- ✓ Reduce Overall Processing Time
- ✓ Roadmap CIP Projects for Future State Integration
- ✓ Business Process Assessment
- ✓ Implementation Strategy
- ✓ Eliminate Manual Processes outside of system

## **Results:**

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The results were an Upgraded PeopleSoft FIN and HCM Solution with Streamlined Processing, A fully Implemented Grants Suite Solution, and a Future State Roadmap with options.