Update: M-Pathways Financials v.9.1 Upgrade

Financial Unit Liaisons

July 20, 2011
Agenda

• Project Progress
• Go-live Timeframe
  – Business Continuity Plan
  – Contingency Plan
• Change Management Information
  – User Testing Results
  – System Demo
  – Change Management Plan
  – Resources
• Action Items and Next Steps
ITS: 9.1 Upgrade Progress

- We are on track to begin the system upgrade on Aug. 4 @ 5PM
- Go-live = Aug. 9 @ 7AM

As of 07/15/11

- Development
  - 100% complete

- System Testing
  - 100% complete

- Performance Support
  - Deadline: 08/09/11
  - 81% complete
Go-live Timeframe

August 2011

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M-Pathways unavailable: Aug. 4 @ 5 p.m. – Aug. 9 @ 7 a.m.
Reporting environments available

• Post-upgrade:
  • 08/09/11: M-Reports and the Accounts Receivable & Billing data set updated to 9.1 and refreshed (overnight).
  • 08/10/11: Select data in the U-M DW refreshed per regular schedule (see list on Fin 9.1 Upgrade Key Date web page).
  • 08/14/11: FINODS & all FIN/Phys Res data sets updated to 9.1 and refreshed.
Business Continuity Plan

Central Offices

• In an emergency, can manually:
  – Create Purchase Orders
  – Cut checks for payments

Your Unit

• Plan ahead
  – Purchase in advance
  – Delay non-essential buying
  – Submit bank deposits by 08/04/11
  – Complete transactions by the cut-off dates

See **Key Dates & Contacts** on the Fin 9.1 Upgrade web site for workarounds, or contact the Central Office for more information

http://www.mais.umich.edu/fin/9.1-upgrade-key-dates.html
Contingency Plan

• M-Pathways Financials v.9.1 or v.8.8 must be available by **08/10/11 at 7:00 AM**.

• If not live with v. 9.1:
  – **Roll-back** to v.8.8 started by 1:00 PM on 08/09/11
  – Select alternative go-live timeframe with least impact to campus
    • 08/11/11 – 08/16/11
    • 08/18/11 – 08/23/11
    • Future date TBD
User Testing Results

• **User Testing** provided feedback on:
  – Current M-Pathways use
    • How a task fits into your job
    • Successes/challenges
  – 9.1 ePro functionality
    • Impact of changes
    • Successes/challenges

• **Participant verified:**
  – Overall level of change is low
  – Campus will adjust to changes quickly

See the participants top three “things to look for in 9.1” on:
eProcurement Changes: Highlights
My Profile: Best uses

- Change/maintain your Ship To location
- You use one ShortCode/ChartField combination for most orders

My Profile defaults are applied to Special Request and PeoplePay reqs only.
**My Profile: Alternate User**

**Alternates** must be able to **approve** reqs or vouchers:
- PR ePro User
- PR Department Manager User

Unapproved reqs/vouchers **do not** route back to you when date range passed

Help your unit’s staff identify the appropriate alternate.
My Profile: Manage Templates

5 % of ePro users utilize Templates

In v. 9.1, the template saves the:

• Vendor
• Req line(s)
• Quantity

Converted v.8.8 templates are saved in My Profile
Simplified layout: 3 req tabs

- Define defaults
- Add line(s)
- Submit the req

Shipping & accounting values applied automatically from My Profile
Manage Requisitions

- Click the arrow to view the status of your order/payment
- Select action list replaces icons
Copy Requisition may replace template use
Opens a new identical req at the Review and Submit page

- Vendor
- Lines
- ChartFields
- Ship To
ePro Req Workflow

- ePro reqs $\geq $100,000 route to the PR Department Manager for approval.
- **Cannot** be approved by the ePro req creator
- If the req contains:
  - An asset Account value, a Hospital DeptID, and Funds 80500 or 82500 it routes to Hospital Capital Assets instead
  - A split distribution, it routes to the PR Department Manager for the DeptID in the first distribution
## Change Management Plan (New)

### July/August 2011

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- **Overview of Change** presentation on web site
- **eProcurement Changes Webinar**
- **ITS Service Center training**
- **9.1 procedures available**

### Email to FIN system & data set users: 07/12/11
- System outage info
- v.9.1 training & resources
- Impacts & key dates
Resources for Information

**ePro Changes Webinar**
- July 21, 1:00 – 2:30 PM
- Demonstration of eProcurement changes
- Lists available resources

Register in My LINC
Keyword: ePro Webinar

**Fin v.9.1 Upgrade Website**
- What’s Changing?
  - Overview of Change presentation
- Key Dates & Contacts
- Training & Resources
- Table Changes
  - RDA and BusinessObjects
- Communication Archive

http://www.mais.umich.edu/fin/9.1-upgrade.html
UL Action Items

• Plan ahead for the system outage
  – Fri., Aug. 4 @ 5 PM through Tues., Aug. 9 @ 7 AM
  – Be prepared for a contingency

• Ensure unit readiness
  – Advertise the outage timeframe to staff
  – Review the business workarounds for the outage
  – Keep your unit informed
    • Visit the Fin 9.1 Upgrade web site: http://www.mais.umich.edu/fin/9.1-upgrade.html

• New users between 07/25/11 & 08/09/11?
  – Consider delaying training until post-upgrade.
ITS Next Steps

• Continue performance support activity
• Conduct the upgrade dress rehearsal
  – July 21 @ 5 PM – July 26 @ 7AM
• Upgrade FINPROD to v.9.1
Questions?