

Project Café Update

Kellogg Administrators November 2008

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Agenda

- Launch is a 'go'!
- Cutover approach
- What's changing
- Getting ready
- Getting help
- Questions?



'Go/no-go' review process

- We use a checklist of more than 160 items to gauge our readiness for go-live
- The checklist includes components for:
 - Technical architecture
 - Interfacing systems
 - Testing results
 - Updates to processes and forms
 - User training



'Go' decision has been made!

- Latest round of 'go/no-go' meetings was held last week
- The recommendation to 'go' was presented to ESEC on 11/10
- We now embark on our final cutover process to move from CUFS to Café



Cutover approach

- Go-live date is December 8th
- Neither CUFS nor PeopleSoft will be available the week of December 1st
- All December activity should occur in the new systems
- Some November activity may end up posting to December



Cutover approach

All functions will be available to users on December 8th, including

- PeopleSoft Financials (NUFinancials)
- InfoEd
- FAMIS
- iBuyNU
- NUPortal
- Cognos reports



Cutover approach

- Data will be converted in a summary fashion
 - Underlying document history will not be converted
- Summarized monthly totals for periods 1-3 FY09 will be converted
- Budgets and encumbrances will reflect a snapshot of when conversion begins



Upcoming Changes Summary

■ Procurement

- Online ordering through iBuyNU for 16 of our preferred vendors
 - Shopper – saves cart for Requester
 - Requester – does the 'check out'
- POs auto-dispatched every 2 hours
- All blanket orders need PRS approval
- Collaborative purchases entered as one order using multiple chart strings



iBuyNU vendors

Apple	VWR
Dell	Invitrogen
Lenovo/CDW-G	Qiagen
Corporate Express	Sigma-Aldrich
Hewlett Packard	Integrated DNA (IDT)
Genesis Technologies	New England Bio-Labs
SHI	Bio-Rad
Barnes & Noble	Promega
Bright Electric	

Upcoming Changes Summary

- Budget and spending
 - NUPortal pages replace old JV, TV, IV, RAC, RBAC forms
 - Ability to use summary level budgets instead of object code detail level
 - No need to open objects
 - Reduced need for transfers



Upcoming Changes Summary

- Accounts payable
 - Direct payment request (DPR) form to be used when PO isn't viable
 - Most employee reimbursements performed via direct deposit
- Cashiering
 - New receipting process replaces NUR
 - Departments prepare own deposits and enter them into PeopleSoft



Upcoming Changes Summary

■ Facilities

- Users can create own service requests and track status online

■ Grants

- Ability to view more attributes about each award
- Budgets entered at a category level
- Cost sharing occurs within same Project as sponsored activity (separate Fund)



Upcoming Changes Summary

- Workflow
 - More document types routed electronically for approval
 - No self approval
 - Standardized workflow approval levels
 - Email notification of pending approval



Upcoming Changes Summary

- Reporting
 - New report formats
 - Increased access to data
 - Reports run by users on demand
 - Use of parameters in reports provides ability to view one chart string or more macro level in same report



How you can prepare

- Attend training: the info you need is online at <http://cafe.northwestern.edu/training>
- Learn your new chart strings: see the COA crosswalk online at <http://cafe.northwestern.edu/coa>
- Manage around key cutover dates: the list is available through our home page announcements <http://cafe.northwestern.edu>



Using the system at go-live

It is reasonable to expect that the initial go-live period will be somewhat bumpy

- Tweaks to user security access
- Too many or too few workflow emails
- Confusion about new processes
- Wait times for help desk calls
- System downtime to fix issues
- General aches and pains associated with replacing a 25 year old system!



Getting help

- Our help desk has been getting ready by attending training and fielding user calls during testing
 - Via phone: 1-HELP (1-4357) ext. #2
 - Via email: consultant@northwestern.edu
- We have also reserved our training rooms for 'open lab' sessions for several weeks after go-live. Schedule is available from our home page:
<http://cafe.northwestern.edu>



Questions?

