insights

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Your window into the VISION Upgrade to v9.2 Project

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VISION Upgrade to v9.2

"The art of progress is to preserve order amid change."

\- Alfred North Whitehead

Organizational Change Management

All organizational change management (OCM) activities have the goal of helping people navigate change while meeting or exceeding the organization's change objectives.

OCM can be viewed as one point of a triangle along with leadership/sponsorship and project management that drives project success. If any one of the three drivers fail; project timelines, budgets, and outcomes are all at risk.

The top corner of the triangle is **leadership/sponsorship**. This corner is responsible for providing the direction and governance for the project. Affected individuals look to leadership in the organization to understand why a change is happening, how it aligns with the direction of the organization and why it is a priority.

The left corner of the triangle is **project management**. This corner is focused on the technical side of a project, such as designing and developing the specific changes to processes, systems, tools, organizational structures and job roles.

The bottom right corner of the triangle is **organizational change management**: the application of the tools, processes, techniques and principles for managing the people side of the project to achieve a desired outcome. For the VISION upgrade we'll be focusing on four areas:

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Message from the Sponsors

As Phase II of the VISION upgrade project begins to wind down, we are excited about what we're hearing from the project team. Our objectives for the project are two-fold: first, to have an up-to-date financial system that is fully supported by the vendor and second, to bring the State's financial system in line with the statutes, bulletins, and directives that guide how we do business. We're confident that the team is making strong progress on both objectives.

PeopleSoft v9.2 comes with a commitment from Oracle to continue support and development for the foreseeable future ensuring a stable and compliant financial system. An updated VISION system will provide new functionality helping to bring the State in compliance with its own policies and procedures while addressing some significant pain-points from a business process perspective.

We hope that you are as eager as we are to see how VISION v9.2 will better support our mission in the future.

– *Adam Greshin, Commissioner - Department of Finance and Management*

– *Brad Ferland, Deputy Secretary - Agency of Administration*

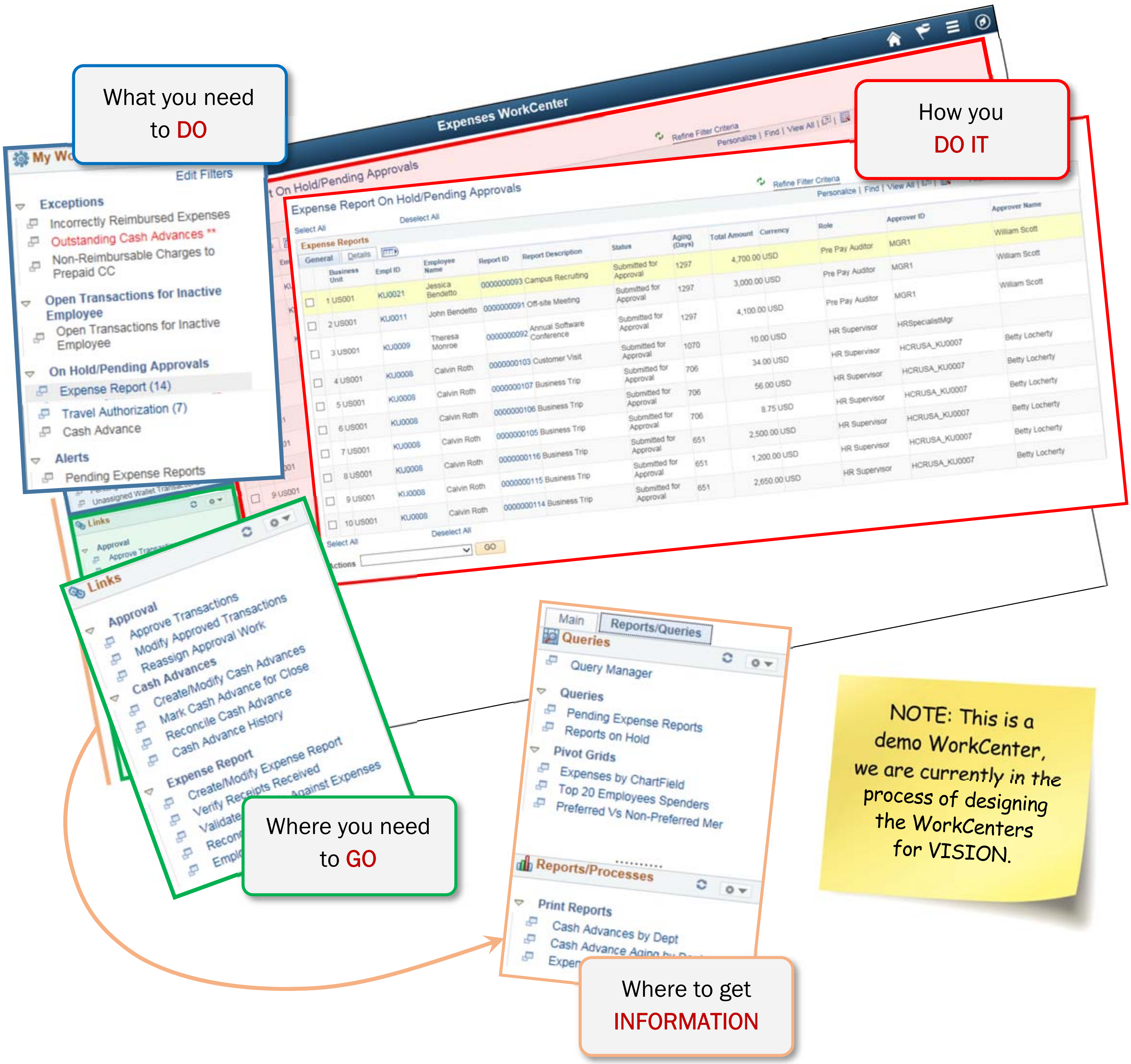
Changes

We'll be highlighting certain changes here, please visit our website for a complete list of changes and how they may impact you.

MODULE	CHANGE	WHAT IT MEANS FOR YOU
Accounts Payable	Changing the address on the voucher invoice line will automatically update the address on the payments page.	You will no longer have to remember to manually update the address on the Payments page of a voucher if the default address is not being used.
Travel & Expense	A pop-up message to notify the user that there is an approved travel authorization that may need to be associated with the expense report.	You will receive a message indicating that you may have a travel authorization to apply to the expense report and you will need to click OK to continue with the expense report.
Travel & Expense	Bill Type on expense report will automatically get updated to "taxable" if the expense line transaction date is greater than 60 days old.	In 8.8 you are required to change the billing type from non-taxable to taxable upon getting an error. In 9.2 the bill type will automatically update and provide you with a warning that the expense line will be taxed.
Travel & Expense	Expense Coordinators will be able to send back for revision an expense report or cash advance that has been approved for payment in error.	This will allow expense coordinators to send back expense reports and cash advances for revision that were approved for payment in error without having to contact Financial Operations to have them perform this function for them.
Travel & Expense	Add Travel Authorization ID field as a search option when searching for a Cash Advance.	You will have an additional option to search for cash advances by using the travel authorization associated with the cash advance.
Travel & Expense	Duplicate checking on expense reports will occur when the employee clicks on save for later or submit.	You will have the ability to review duplicate exceptions and correct before submitting for approval or saving for later. You will need to click ok to continue the save or submit process or cancel to go back to the expense report and review errors and make changes.
Travel & Expense	A pop-up message will remind user to apply the cash advance when an expense report is associated with a travel authorization that is linked to a cash advance.	You will see a message if there is an associated cash advance requiring you to click OK before you can proceed with the expense report.
Asset Management	New Profiles in 9.2 will be created that will be tied to dollar thresholds.	You will no longer have to decide on when to choose an "Expenses" profile or a "Depreciable" profile. You will choose the profile based on what the asset is and the system will decide whether it should be capitalized or tracked.
General Ledger	There will be a system edit that compares the fiscal year associated with the budget journal date with the budget period on all Budget Journals.	You will no longer be able to enter a budget period that is different than the fiscal year on budget journals. This will eliminate the need for Finance to unpost budget journals with the fiscal year and budget period out of sync requiring departments to reenter the journals correctly.
Grants Tracking	The award page will now allow for attachments.	You will be able to attach copies of the grant agreement part 1 and 2 to each grant award entry.

WorkCenters

In VISION 9.2 WorkCenters will bring together all of the tools you need in one place. You'll see your pending work, links to business processes, and reports and queries for each module, making it easy to navigate and get your work done efficiently.



OCM *continued from page 1*

leadership, communications, end-user training, and knowledge transfer.

Project leadership is responsible for providing the overall direction and scope of the project while ensuring that adequate resources are available to deliver the desired outcomes. The VISION upgrade project sponsors are Adam Greshin, Commissioner – Department of Finance and Management and Brad Ferland, Deputy Secretary – Agency of Administration.

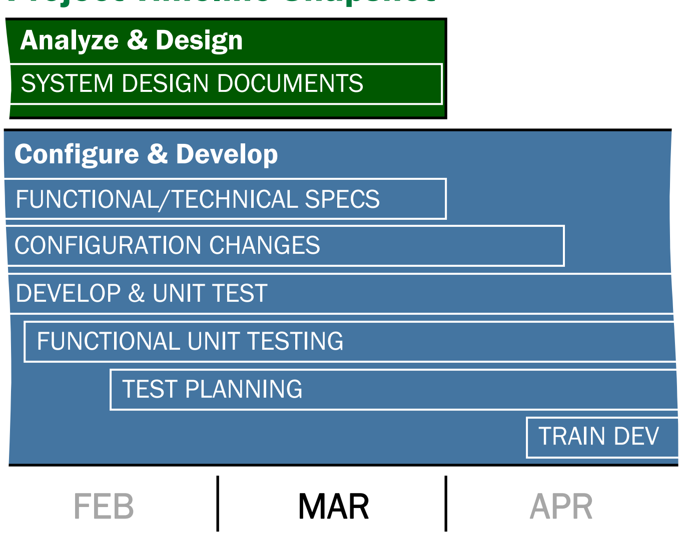
The VISION upgrade project communications plan is designed to provide you with general knowledge about the project, how changes related to the project will affect you, what you need to do to prepare, and how to use and optimize the new version of VISION. Communication methods include this newsletter, a project web site, and the Readiness Coordinator Network (RCN.) The RCN is made up of representatives from across all Agencies and Departments. The RCN is designed to provide a two-way communications channel between you and the project team. We'll be relying on RCN members to share information with you and share your thoughts and concerns back with the project team.

End-user training will provide you with the information you need to perform your financial work in the upgraded VISION system. Delivery methods can include in-classroom training, live and recorded webinars, updated manuals and job aids, and open lab sessions. Of course, the VISION support team will always be ready to assist you as always.

The knowledge transfer plan ensures that the State's functional and technical support teams have the expertise they'll need to maintain the upgraded system once the implementation project is complete. State employees will be working closely with their Sierra-Cedar partners to build their understanding of the new version of VISION. We'll measure their skill level several times throughout the project to confirm that they are ready.

The upgrade project's OCM activities will help you be confident that the transition to the new version of VISION will be as painless as possible and that you'll be able to accomplish your financial tasks the day the new system goes live.

Project Timeline Snapshot



As of March 5, 2018

The project is:

- In scope
- On schedule
- Within budget