

CMS FIN 8.4 Upgrade & Phase 2 - Roles and Responsibilities

PeopleSoft Functionality

The purpose of this document is to clarify the roles and responsibilities for the CSULB Finance 8.4 Upgrade and Phase 2 Implementation Team members.

The Project Team is comprised of campus personnel and outside consultants serving in one or more capacities (roles). Each role carries with it a set of defined responsibilities. Personnel or consultants serving in various roles agree to and are accountable for their respective responsibilities.

The following roles are defined:

<p>Area Manager</p>	<p>Accountable to the Steering Committee. Responsibilities include:</p> <ul style="list-style-type: none"> • Establish and support a business case, vision and guiding principles • Develop and support a decision framework, including issue and conflict resolution among project constituencies • Approve project scope, goals and strategies • Approve project plans, budgets, schedules and key milestones • Function in an advisory capacity through Upgrade and Implementation
<p>Project Manager</p>	<p>Reports to the Area Manager and Project Director. Responsibilities include:</p> <ul style="list-style-type: none"> • Structure and manage the project • Recommend project scope, goals and strategies • Develop project plans, budgets, schedules and key milestones, and monitor throughout the project • Promote campuswide partnerships and project buy-in, and manage expectations • Serve as liaison between Finance project teams and Campus CMS Management • Report project progress to CMS Project Director, as

	<p>requested</p> <ul style="list-style-type: none"> • Support the decision framework, including issue and conflict resolution among project constituencies • Oversee all phases of the Finance 8.4 Upgrade and “Phase 2” project • Ensure success of the project • Support the applications and users after Go Live
Application Lead	<p>Accountable to the Project Manager. Responsibilities include:</p> <ul style="list-style-type: none"> • Timely completion of assigned tasks and deliverables as specified in the project plan • Regularly report project status and issues to Project Manager • Support the decision framework, including issue and conflict resolution among project constituencies • Conduct business process fit/gap (or oversee team members appointed to do so) • Assist and support other Application Leads with integration and cross-departmental responsibility issues • Communicate expectations with campus community • Oversee team members upgrade and implementation of the system, as well as, participate in the performance of Application Team Member tasks and responsibilities • Ensure success of the project • Support the applications and users after Go Live
Application Team Member	<p>Accountable to the Application Leads and the Project Manager. As delegated by the respective Application Lead(s) responsibilities include:</p> <ul style="list-style-type: none"> • Map, evaluate, and fit/gap existing business processes • Recommend alternative processes • Align recommendations with project goals and guiding principles • Identify new requirements and produce specifications • Collaborate with other Application Teams to ensure

	<p>alignment of business process recommendations with integration and technical considerations</p> <ul style="list-style-type: none">• Review other CSU campuses and other higher education institutions for Best Practices• Integrate the new application(s) with other PeopleSoft applications and existing third-party systems• Adhere to the project's software enhancement process• Plan for and set up ongoing production control processes to administer the daily processing of the system after Go Live• Consider and address departmental and end-user access, support and functionality needs• Produce system configuration documentation for production control• Produce business process documentation for departments and end-users• Produce training materials and participate in delivery to users• Identify central and end users, and define security access and profiles• Validate converted/upgraded data• Ensure success of the project• Support the application and users after Go Live
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Responsibility Acceptance Sheet

Acceptance establishes your agreement to be serve in your assigned role(s) and to be accountable for the respective responsibilities:

Finance Area Manager

Joseph Latter	Role	Date
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Finance Project Manager
Integration Team Lead

Shawn McCown	Role	Date
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Accounts Payable Lead
Vendor Master Lead

Lauri Reilly	Role	Date
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Procurement Lead

Charlie Hughes	Role	Date
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Procurement Co-Lead

Liz Beall	Role	Date
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Procurement Co-Lead

Michelle Totten	Role	Date
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General Ledger Lead

Les Freeman	Role	Date
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A/R Billing Lead

Maria Ito	Role	Date
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Budget Lead

Candie Sagehorn

Role

Date

Financial Reporting Lead

Maria D'Aloisio

Role

Date

End User Reporting Lead
Technical Lead

Christine Welch

Role

Date

Asset Management Lead
Training Lead

Kristina Randig

Role

Date