ERP
What is ERP?

- ERP – Enterprise Resource Planning
- Integrated University-wide administrative system
- Phase I – Accounts Payable, General Ledger, Purchasing
- Future Phases will include Research Administration and Human Resources
ERP
Objectives/Benefits of ERP Project

• To enhance customer service by supporting efficient administrative practices
• To provide students with access to information and technology to enhance their educational experiences
• To provide faculty with grants management and student-advisory communication tools
• To provide administrators with real-time access to key information and flexible reporting tools to meet their reporting needs.
ERP Terminology

Dept ID – previously referred to as Account Number
Account – previously referred to as Expense Class
Project – previously referred to as Grant Number

Event – New field used to group related expenses
examples: CSWE
Recruiting Travel
Benson Staff Awards Event
<table>
<thead>
<tr>
<th>Department</th>
<th>ID</th>
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<tbody>
<tr>
<td>Student Services</td>
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<td>Harris Library</td>
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ERP
Transaction Procedures

• PeopleSoft allows the user to do most transactions on-line. In some cases, paper will still need to be processed. This will require printing the on-line form and bringing the form with all appropriate back-up documentation to Administrative Services. Although Check Requests are entered on-line, they are not processed by Accounts Payable until paperwork is received.
• Purchase Requisitions cannot be used for purchases under $1,500. Other methods included PCards and Corporate Express. Check Requests are not to be used for reimbursement of expense. They are to be used only in situations where no other form of payment is available.
ERP
User Access

• All users must attend University ERP Training Sessions in order to retain access to PeopleSoft:
  Overview
  EProcurement
  General Ledger
  Accounts Payable
• All users must complete the University Employee Confidentiality Agreement and Security Form.
• All MSASS users will have the ability to submit purchase requisitions, check requests, and journals.
• Administrative Services approves all transactions.
ERP
Security Forms

• All users of PeopleSoft are required to complete a Security Access.
• Supervisor signature is required.
• Management Center signature is required.
• Employee must sign an agreement indicating that you will not access any information that is not relevant to your job.
• In cases where staff member has access and department director or principle investigator does not, an additional MSASS form will be required. This form indicates that the supervisor and employee understand that any purchases or financial transactions must be done with the PI or Directors knowledge.