Supporting PeopleSoft in an Academic Environment: Pitbull or Poodle?

Jen Whiting
Princeton University
87 Prospect Avenue
Princeton, NJ 08544
609-258-4576
whiting@princeton.edu

Gary Eshbaugh
Princeton University
87 Prospect Avenue
Princeton, NJ 08544
609-258-4769
eshbaugh@princeton.edu

ABSTRACT
Over the past decade, distributed computing necessitated a centralized support environment at most colleges and universities. This development has given campus computer users the distinct impression they can contact one group to receive support on a myriad of computing problems: e-mail, printing, productivity and publishing tools, and more. The typical computer user on most college and university campuses is at least aware of, if not actively utilizing, the central support organization. Typically, this support has not extended to University business applications.

In recent years, the trend to "buy, don't build" has brought what were specially developed University business applications into the distributed computing model. This paper will discuss the transition Princeton University has made from a mainframe business application model to a model that deploys PeopleSoft business modules to the majority of administrative users on its campus. This paradigm shift has also moved the support of the business applications into the central support organization on campus, the Help Desk. In particular, we will discuss the history, development, and needs of an organization that has traditionally supported computer productivity and communication tools but is now called upon to support University business applications as well. The module we will consider in this paper is the PeopleSoft Financials purchasing and financial reporting application.

Keywords: PeopleSoft, university business applications, support.

1. HISTORY
Princeton University developed and implemented a mainframe-based purchasing application in the 1980s. This application was accessed through a login to the centrally administered University mainframe, PUCC. Administrative users on campus accessed several University business applications on PUCC and became familiar with the central login, user interface, print functionality, and access modes. In the mid-1990s, a Partnership 2000 Office was established, particularly to implement the transition to a non-mainframe business environment on campus. Areas that were identified as eligible for migration were the purchasing and financial reporting areas, the human resources area, student records, and the campus directory. After several search and testing teams analyzed the available products, PeopleSoft was chosen as the product for these migrations.

The first area to migrate was the purchasing and financial reporting functions. The University selected a core team of purchasing specialists (including those responsible for the support and training for the previous mainframe system) from the Treasurer's Office and paired them with a team of technical specialists from the Computing and Information Technology department. This group worked with outside consultants and PeopleSoft to identify the customizations, data storage environment, access modes, security, workflow issues, and financial reporting needs. The go-live date for PeopleSoft Financials was set for December 1998.

2. THE DESKTOP ENVIRONMENT
Prior to the rollout of any of the new PeopleSoft modules, it was determined the University would benefit from a computing environment that allowed for the installation, support, and standardization of desktop machines in a remote fashion. After much investigation and testing, Windows NT 4 was chosen as the operating system best suited to the demands of the upcoming business-tool deployments. This endeavor resulted in 1,200 new desktops brought to campus, a minimum standard for participation in the "Princeton" NT domain, and a policy limiting the installation of University business applications to machines that are members of the Princeton domain.

Groundwork had now been completed to allow for the installation of PeopleSoft Financials on these "administrative desktop" machines via remote Microsoft SMS pushes and the maintenance of the installation through NT login scripts. The University also developed a council of departmental representatives (the Desktop Systems Council, DeSC) to oversee the deployment and maintenance of this new desktop environment.

3. IDENTIFYING SUPPORT RESOURCES
Princeton University has long maintained a central support environment, the Help Desk. The goal of the Help Desk has been

to be the “central point of contact” for campus computer users for all their computing needs. The Partnership 2000 Office identified the central University Help Desk as the appropriate organization from which to provide PeopleSoft functional support. [1]

This movement toward centralizing the University business application support in the central Help Desk provided the Help Desk an opportunity to enter a new relationship with financial system users on campus, many of whom had never or rarely used the services of the Help Desk. Additional resources were allocated (two full-time lines were created) to act as PeopleSoft Financials consultants for approximately 1,400 PeopleSoft Financials users. [2]

4. BUILDING THE SUPPORT RELATIONSHIP

Immediately following the identification of the Help Desk as the first point of contact for the PeopleSoft Financials users, negotiations for the support level agreement began. The Partnership 2000 Office identified the needs of the Financial users as similar to that of the existing Help Desk customers. [3] It was also determined that only full-time professional staff (as opposed to student staff) would support PeopleSoft Financials. This policy addressed the training and awareness of University financial business rules the consultants must maintain and quelled the concerns about Help Desk consultants being granted rights to every project/grant and all associated orders and financial reports. [4]

Two months prior to the projected go-live date, the Help Desk began participation in “train-the-trainer” activities. This was the first time the Help Desk saw PeopleSoft Financials. Attending the training sessions made it clear that the users were about to be given a system they would feel was miles away from the mainframe system. PeopleSoft Financials is a mouse-driven, Windows-based client that relies upon a user being comfortable with the mouse, the interaction between network drives and printers, and their desktop environment. In addition, business rules were changing slightly, and this change would further complicate the transition.

It was during the train-the-trainer sessions that the building of the support relationship truly began. The Help Desk would need to be in daily contact with the technical support consultants in the Treasurer’s Office to clarify business rules as well as ask system support questions. We would also need to clearly understand the technical relationships required for a user to successfully run PeopleSoft, login, create, print, and move an order on to its next destination. The train-the-trainer sessions gave us the opportunity to interact directly with the functional consultants that had been pulled from their purchasing duties to create the PeopleSoft Financials team in the Treasurer’s Office. This team had a tremendous investment in the success of the rollout, and they were acutely concerned with our ability to adequately support their product. This interaction was the first crossroad that allowed us to begin building a support relationship.

The implementation team recognized that we were experts at talking with customers, distilling information that was often beyond a user’s comfort level, and allowing the customer to move beyond her frustration with a computer program and achieve the result she wanted. This set of skills was exactly what the implementation team was looking for. They began to understand that we were as deeply involved in the success of the rollout as they were since the Help Desk had been identified as the support resource. For the Help Desk, the real work was about to begin.

5. DEVELOPING PEOPLESOFT SUPPORT SPECIALISTS

The challenge now facing the Help Desk was how to develop consultants that had technical knowledge as well as proficiency with University purchasing business rules. The designated Help Desk consultants quickly became immersed in the PeopleSoft rollout. These consultants were pulled from their other responsibilities and given wholly to the rollout effort.

The Help Desk consultants became trainers for many of the PeopleSoft Financials training classes being offered for the users. This role not only allowed us to become very familiar with the interface, it also presented us as experts to the campus community. We were able to demonstrate that we would be available to support the user community as well as come to better understand the needs of the users being migrated from one system to another. This participation in the training proved invaluable. We were involved as trainers’ three weeks prior to rollout and remained involved four months after rollout. Awareness of the Help Desk was growing on campus. We were about to be tested.

6. THE ROLLOUT

In preparation for the go-live date, we negotiated with the Treasurer’s Office and secured the assistance of the person who was the functional expert on the previous system and had been responsible for training and supporting users on the mainframe-based purchasing system. It was decided she would assist the Help Desk for the first three weeks after go-live, actually taking calls and continuing the functional training of the Help Desk consultants. At the time, none of us realized how critical the partnership between the Treasurer’s Office and the Help Desk would become. The willingness of the Treasurer’s Office to sacrifice a member of the implementation team to our phone operations showed their commitment. Having the person on campus that was the functional expert on the previous system gave the Help Desk credibility we would have been unable to build on our own.

The Help Desk installed two phone lines dedicated to PeopleSoft support and fashioned a cubicle space to house the PeopleSoft lines. The go-live date was fast approaching.

6.1 The First Call

At 8:30 a.m. on December 15, 1998, PeopleSoft Financials became the purchasing application at Princeton University. The creation of requisitions, purchase orders, and receivers could only be done through PeopleSoft Financials. Over 1,400 users had been created in Financials, and most of these people had attended multiple training sessions. The work of the implementation team was coming to fruition, and now the test of the Help Desk's preparations would begin.

One hundred and seventy-four calls passed through the two PeopleSoft phone lines that first day. Lunch was brought in, and when the phones closed at 5:00 p.m. we realized the enormity of the road that lay ahead. The Help Desk consultants had a good grasp of the technical requirements, and the purchasing specialist had a good grasp of the business rules. The question remained: how do we merge these two sets of knowledge into one and leave the Help Desk prepared to handle PeopleSoft Financials calls for as long as it is on campus? How does the University migrate from having a purely technical Help Desk into having one that is flexible enough to support business questions as well?

7. THE ROAD TO COMPETENCY

During the first three weeks of the rollout, it was clear that the Help Desk consultants had gleaned the navigation skills and "How-do-I" answers well from acting as trainers during the previous weeks. The missing skill was the understanding of the business rules. Although it was helpful that some of the consultants had previous purchasing experience, we needed to understand Princeton's business rules, and fast.

It was no small feat for the purchasing specialist to handle the calls she was taking as well as correct us in mid-sentence on the calls we were handling. We had stationed the two phones in a rather small cubicle out of necessity, but this proved rather useful during those first weeks. Frequently the purchasing specialist would reach over to take control of the mouse on a Help Desk consultant's machine to guide us to an answer, all while handling her own caller.

During the first few days, the gaps in documentation became very clear. We furiously began publishing "cheat sheets" on how to create orders, so we could direct users to them on the web if they had lost their handbooks. We faxed out fund code sheets to users who did not know which one to use. Along with PeopleSoft Financials came a shift in the vocabulary ("account number" became "project grant," "object code" became "account code" among others) so we created a PeopleSoft dictionary. [5] Our ability to respond quickly with web page development allowed the Help Desk to contribute to the success of the project.

The timing of the rollout dovetailed nicely with the University's holiday schedule, and within two weeks, the phones cooled. Although this schedule was not, perhaps, planned, it did alleviate some of the stress actually occurring at a time when many administrators had upcoming holidays to assuage some of their trepidation with the new system. By the first week in January, we had become nearly competent.

8. BECOMING A FIXTURE IN THE PEOPLESOFT LANDSCAPE

Although we had become nearly competent in a short time, we needed to continue giving answers, nay, the right answers, when the questions truly became more difficult. The first few months were spent assisting customers in the creation of orders, navigation of the screens, printing, and learning the new vocabulary. When the questions became more difficult (why is my order not budget-checking correctly, is this project/grant available for capital purchasing) we again had to go through a learning curve with our contact in the Treasurer's Office. It was not long before the Treasurer's Office had a queue in our tracking system. We began passing tickets to them for advanced business rule clarification or technical support.

Becoming the support arm for PeopleSoft Financials has given us a place in the University landscape that we had not yet achieved. Our customer base grew to include the Financials users; customers who had not contacted us prior to the PeopleSoft rollout now realized there was a group on campus available to assist them with other computing problems as well; our knowledge grew to include university business rules. Indeed, we were hovering somewhere between the Treasurer's Office and the Computing and Information Technology department.

9. THE QUALITIES OF A HELP DESK PEOPLESOFT CONSULTANT

Help Desk consultants have long understood the demands of communicating with someone who is frustrated by a computer program, the customer's desire to simply be able to get her work done and not be bothered by computers, and the inherent need to understand all the facets of network computing to successfully reach an answer. All of these demands materialized in the PeopleSoft support environment and were mixed in with one other basal difference: using PeopleSoft is not something the users want to do nor something they want to like doing.

The realization that PeopleSoft users were not excited about the business changes the system instituted (purchasing and approvals becoming ever more distributed) brought into focus for the Help Desk the critical needs of a PeopleSoft consultant. This support environment mirrored the typical technical support environment (how do I check my e-mail, how do I print) with one exception. PeopleSoft users perceived (whether accurately or not) they were being asked to do more than they had in the previous system to achieve the same result.

Dealing with the emotions this perception brought to our PeopleSoft customers was another tier of the consulting skills needed. Positioning the Help Desk midway between the Treasurer's Office and the technical implementation of the system allowed us to remain as non-committal as possible when faced with frustration and accusations from customers. We were able to say, "Yes, this is different, but this is how it works now, let me help you with it." The Help Desk had the luxury of being able to relate to the difficulties that the users were experiencing, yet not be the group that was perceived as bringing about the changes. This distance has proven advantageous. While it is true for all the consulting done by a Help Desk that we hold the answers, but do not run the systems, in the case of PeopleSoft, it has been more of a blessing than a curse.

Although all Help Desk consultants need to be patient and willing to talk a customer through a situation, we found that PeopleSoft consultants must have qualities of compassion beyond the norm. PeopleSoft consultants must be able to truly understand the pressures placed on the administrators who are asked to use the system with no other options and help them navigate cleanly through the clouds of frustration.

10. THE END-OF-FISCAL-YEAR EXPERIENCE

Every set of users have their "hot" times: students returning to campus, and then again during exam time; professors needing to finish research grants; administrators preparing for an upcoming semester. Supporting PeopleSoft Financials introduced the Help Desk to a new "hot" time: the end-of-fiscal-year.

With the end-of-fiscal-year come new budgets, the closing of last year's accounts, and the rolling of Purchase Orders from the last fiscal year to the current fiscal year. Supporting users through these trying times has highlighted for the Help Desk areas that need more attention. The end-of-fiscal-year is a finite time, and a time in which, if a user does not finish her work, the opportunity is lost and must be redone in the next fiscal year, or perhaps even the loss of an opportunity to successfully close an account as she wanted. Being aware of the upcoming limitations, based on the end-of-fiscal-year, is proving paramount to our being seen as allies by our customers. We have traveled through two end-of-fiscal-year closings with our customers and are still struggling to get them the right information at the right time. An example of this is clearing all requisitions prior to the end of the fiscal year, as requisitions do not roll to the next fiscal year. Requisitions that do not become purchase orders prior to the end-of–fiscal-year need to be recreated in the next fiscal year.

11. SUPPORT FUNCTIONS VS. PURCHASING FUNCTIONS

The end-of-fiscal-year is an area that crosses from support functions to business functions; an area in which we find ourselves treading lightly throughout our involvement with PeopleSoft support. We struggle with the question of where our expertise in relating to customers' needs ends and the purchasing department's expertise in maintaining University business rules takes over. Clearly we are not purchasing specialists, and we recognize they are not support specialists. How can we function side-by-side such that the PeopleSoft users receive the benefit?

The relationship that was forged with the Treasurer's Office early in this implementation remains today, and acts as our conduit to the distributing arm of the Treasurer's Office. It has taken us a full fiscal-year cycle to understand the patterns of purchasing, and will probably take another full cycle to adequately identify the areas in which communication with users will limit frustration. Both groups recognize the other's strengths, and the Help Desk has a direct line to the leaders of the project. Our customers would benefit from us taking a more active role in the distribution of purchasing details.

12. IS SUPPORTING PEOPLESOFT TRULY DIFFERENT FROM SUPPORTING OTHER APPLICATIONS?

In short, no. A Help Desk needs knowledgeable, patient, compassionate consultants, adequate training, access to changing information, and a good relationship with the second-tier groups. As with all consulting, a Help Desk in an academic environment does one must gain the confidence of your community and your organization. The difference is that to successfully support PeopleSoft in an academic environment, a Help Desk must also build a trust relationship with the administrative office that is responsible for the business rules and gain *its* confidence, an area that a central Help Desk might not have journeyed into before. When this relationship is achieved, a central Help Desk truly has taken an opportunity for success and woven it into the fabric of its existence.

13. ACKNOWLEDGEMENTS

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14. END NOTES

[1] Functional and technical support are delineated in the following manner: functional support is provided to PeopleSoft Financial users who are experiencing difficulty creating, editing or tracking requisitions, purchase orders or receivers, or need clarification on the abilities and navigation features of the financial reporting tools; technical support is provided to the consultants providing functional support when it is determined a process or workflow element is not functioning as intended.

[2] The support role for the mainframe-based purchasing application had historically resided in the Purchasing Department. The single full-time line had been moved into the PeopleSoft Financials implementation team and upgraded to a business rules specialist position, a position that remains in the team today, assisting with technical support as well as future migrations (to new versions of PeopleSoft Financials).

[3] Immediate pick-up for at least 75% of calls, others receiving a call-back within 10 minutes; e-mail support provided within one business day, with support hours during each business day from 8:30 a.m. to 5:00 p.m.

[4] This access has proven to be a critical point in the success of this implementation. Had the Help Desk consultants not been granted full-access to each order and financial report, it

would have been nearly impossible for them to support the users in the clarification of details, checking of statuses, etc.

[5] These items are available for review at http://helpdesk.princeton.edu/peoplesoft.