

PEOPLESOFT CSS/HCM SPLIT

The Way Forward
Kick Off Meeting
February 3, 2014

Agenda

The History of the Project

Where are We - We are Here!!!

Project Team and Governance Structure

Introduction of Navigator – The Partner

What Does the “Split” Mean to You?

Project Time Line (draft) with Approval Request

New Project Management Steps – What Will be New?

Rules of Engagement

Planning for the Next Phases

Communication Plan

Questions and Answers

The History of the Project

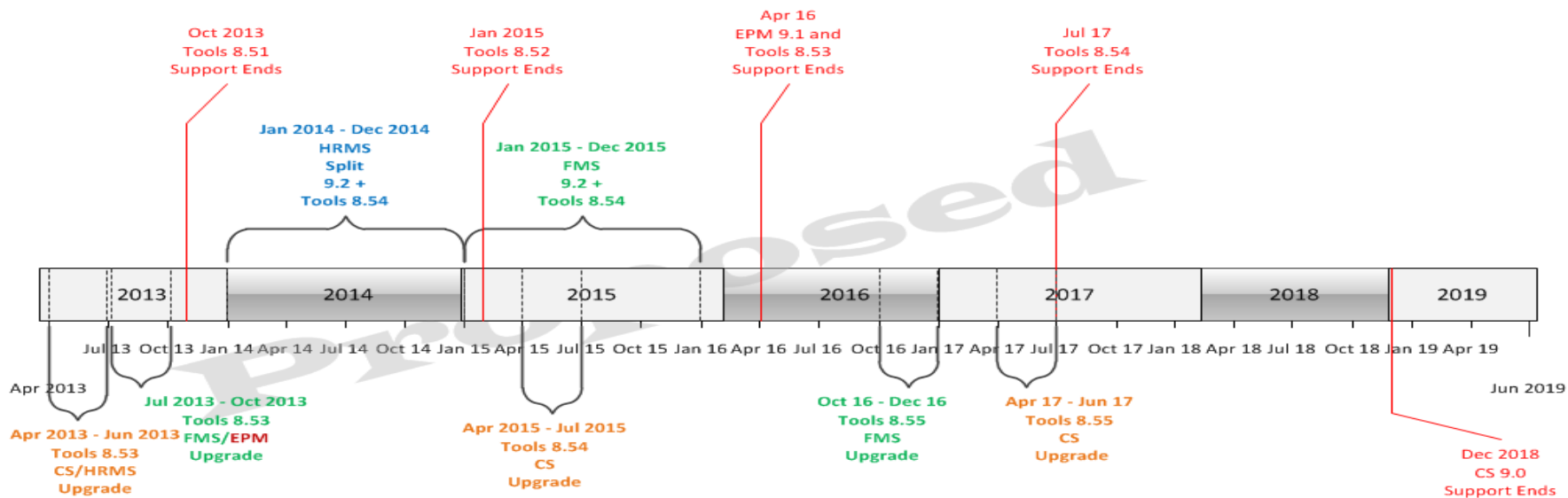
Product Support End Dates

Release	Extended Support Ends
CS 9.0	Dec-2018
CS/HRMS 9.0	Jun-2015
HRMS 9.0	Jun-2015
HRMS 9.1	Sep-2017
FMS 9.1	Nov-2017
Tools 8.51	Oct-2013

The Projected PeopleSoft Application Road Map

A

Peoplesoft Upgrade Timeline
For CSS/FMS/HRMS
Bring to current level



HRMS needs to be first, because HRMS 9.0 support ends June 2015.

Updated 1/23/2013

Major Application System Upgrades every ~3 years.
Tools Upgrades occur every 12 to 18 months.
Giving 6 to 12 months after releases to stabilize.

April 8, 2013 – Executive Sponsors

- 1) Form a Project Team
 - Business and Technology Project Leadership
 - Business and Technical team Members
- 2) Build a Project Structure
 - Project Timeline
 - Scope
 - Budget
- 3) Select Implementation Partner

PeopleSoft Application Road Map

Progress to this point

- Form a project Steering Committee with members from each Division – 4/8/2013
- Upgraded CSS/HCM Tools – 8.5.3.06 – 6/16/13
- Researched the concept of the “Split”
- Created/Submitted/Awarded an RFP for an implementation partner – 12/23/2013
- Upgraded FMS Tools – 8.5.03.-6 – 1/6/2014

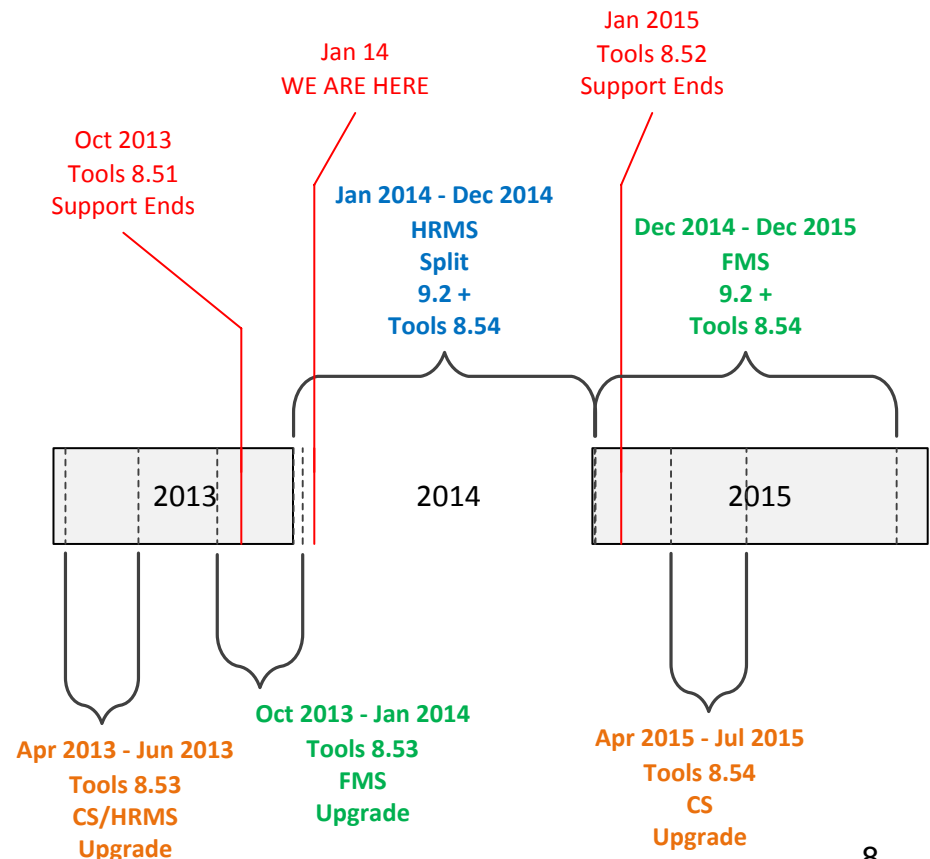
WHERE ARE WE?

We are HERE

The PeopleSoft Application Road – 3 year project

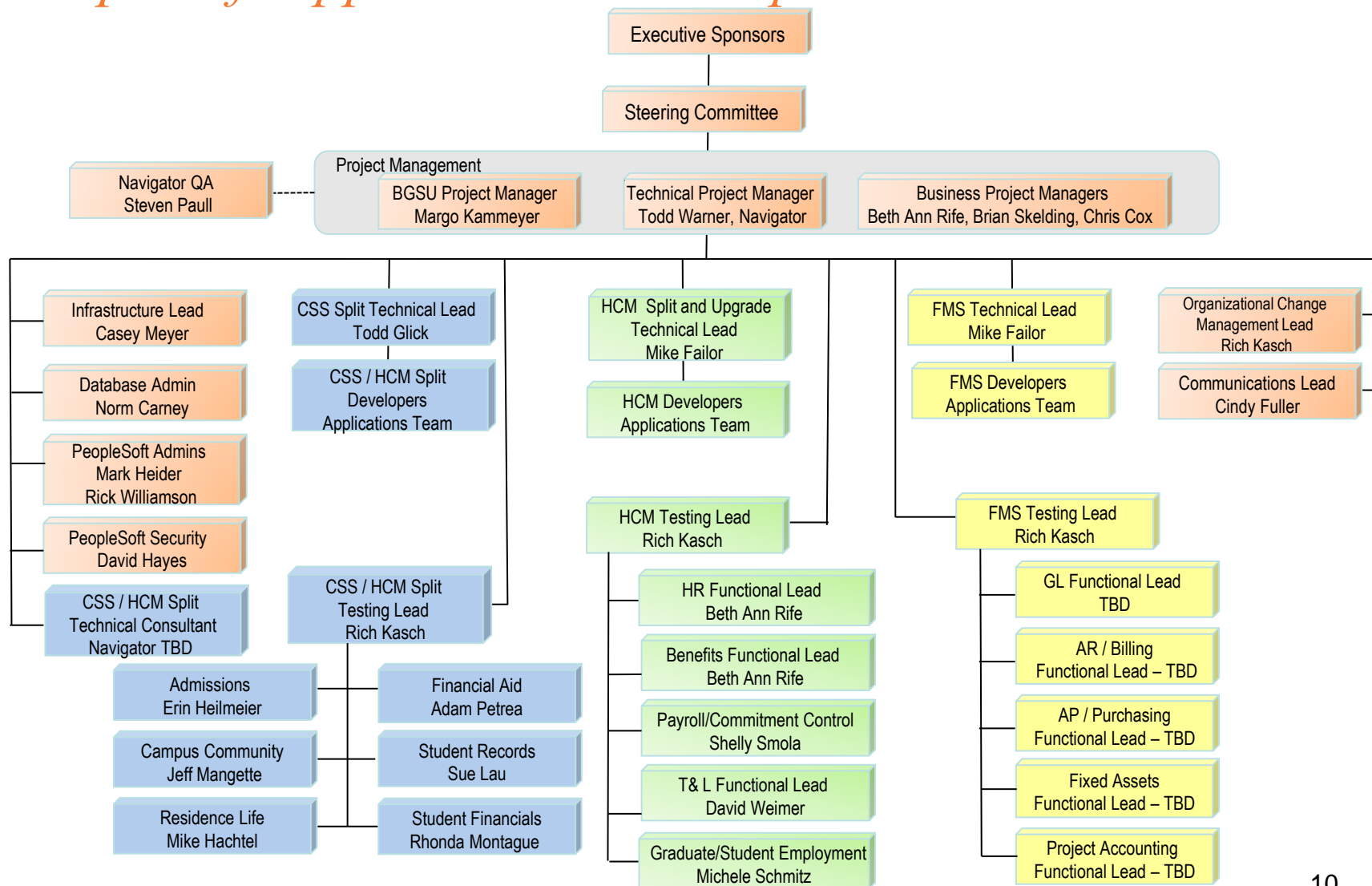
We are:

- 1 Year of activities successfully completed
- On Target
- Moving Forward

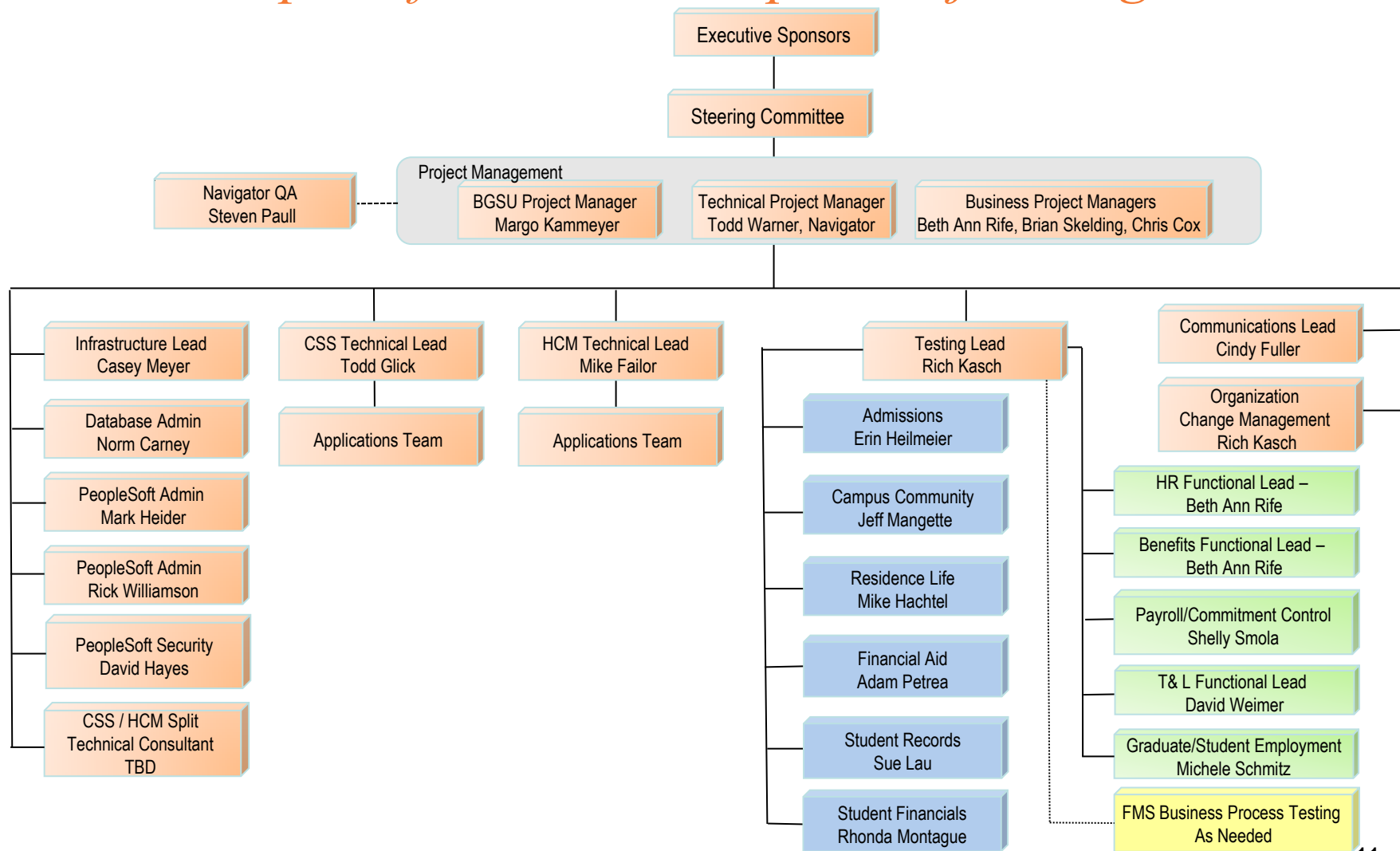


PROJECT TEAM ORGANIZATION STRUCTURE

PeopleSoft Application Roadmap Governance Structure



PeopleSoft CSS/ HCM Split Project Organization



Subject Matter Experts / Project Stakeholders

OUR IMPLEMENTATION PARTNER

Navigator Management Partners

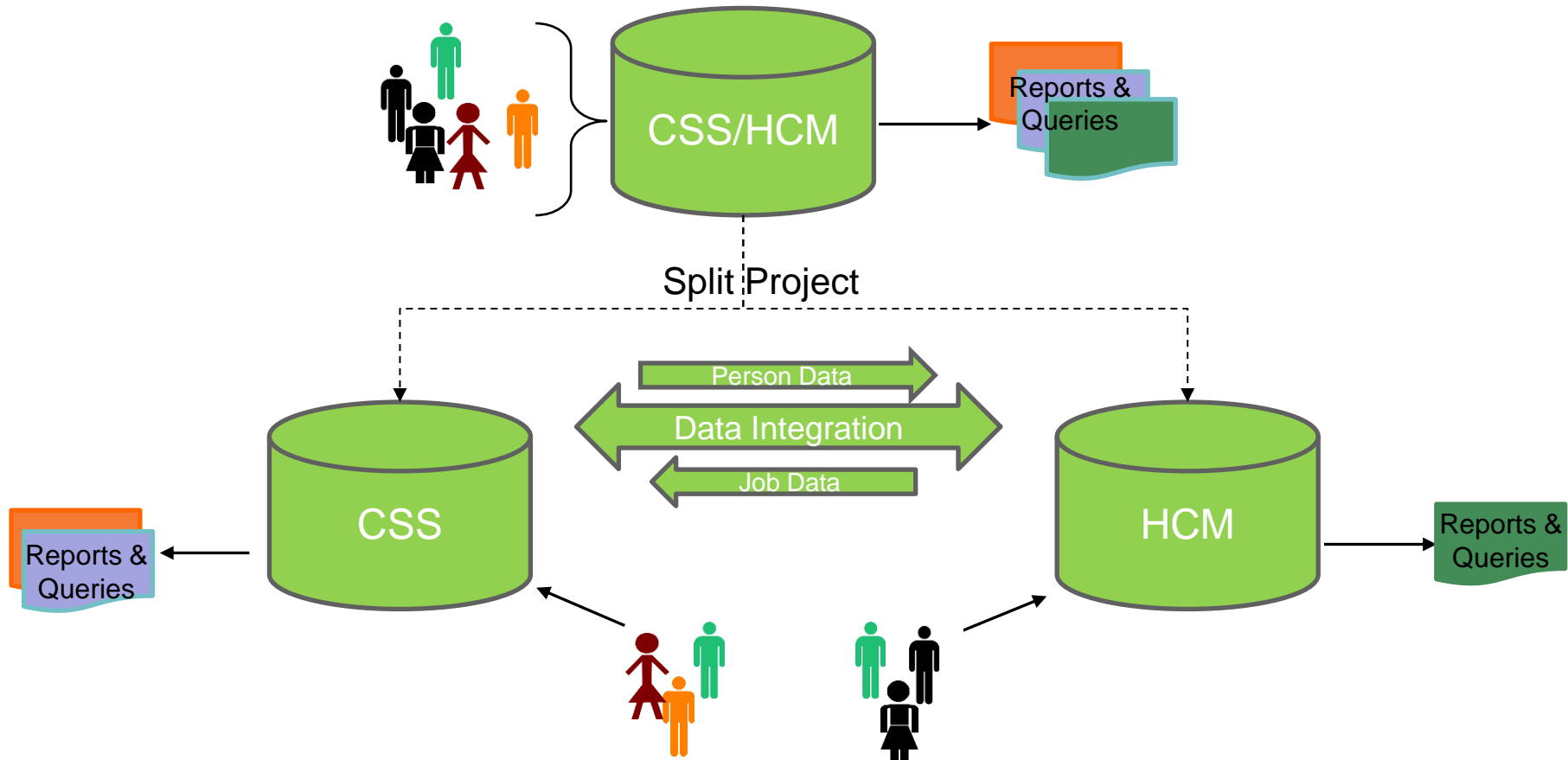
Implementation Partner

- » Navigator Management Partners – Columbus, Ohio
 - » Found in 2001
 - » Founding members of the company are ex-Ernst & Young and ex-Arthur Anderson consultants
 - » Experience with large ERP projects working in several capacities – leading, assisting or clean-up
 - » Higher Education Experience. Currently assisting with the OSU Projects



WHAT DOES THE SPLIT MEAN TO YOU?

What Does the Split Mean to You?



What Does the Split Mean to You?

- Review of Customization

Type of Customization	Count
Interfaces	100
Customizations to Delivered Processes	88
New Bolt-On Processes/Components	73
Custom Reports	33

- Queries

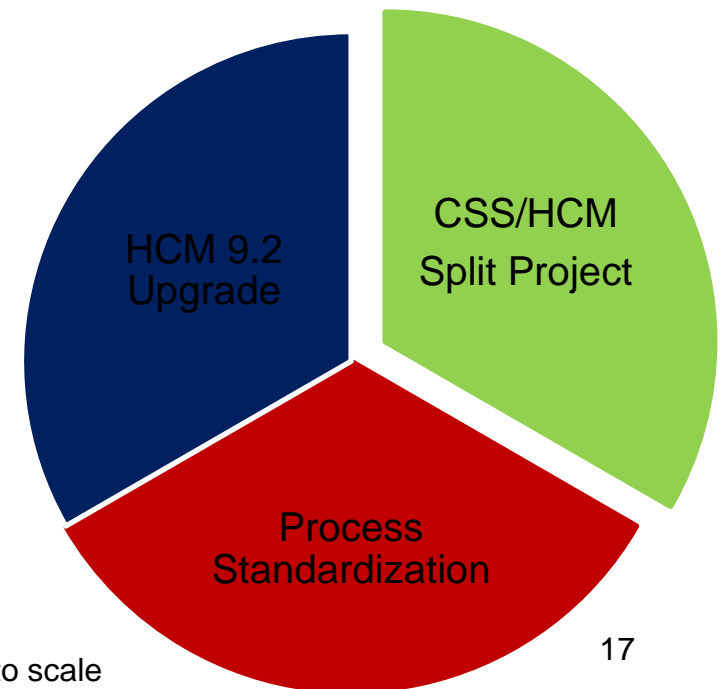
Queries	Count
Total Queries	11,844
Queries Executed < 12 Months Old	6,973
Queries Executed > 12 Months Old	4,871

- Guiding Principle
 - All customizations will need to be tested
 - Any Public query that has not been executed within 12 months will be removed
 - ITS will identify potentially impacted queries, it is up to the end users to test and/or modify impacted queries

What does the Split Mean to You?

- Security will be impacted
- The scope and degree of changes will be driven by the following:
 - Assessment
 - Impact Analysis
 - Long Term Strategy

*Distribution of Security Effort



*Not drawn to scale

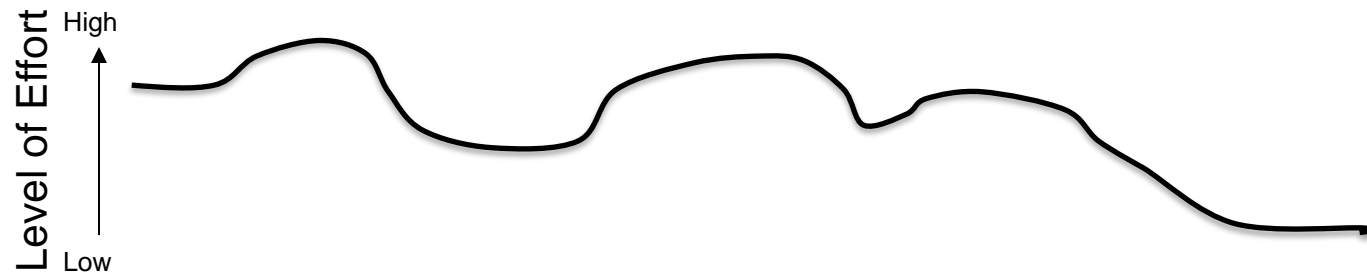
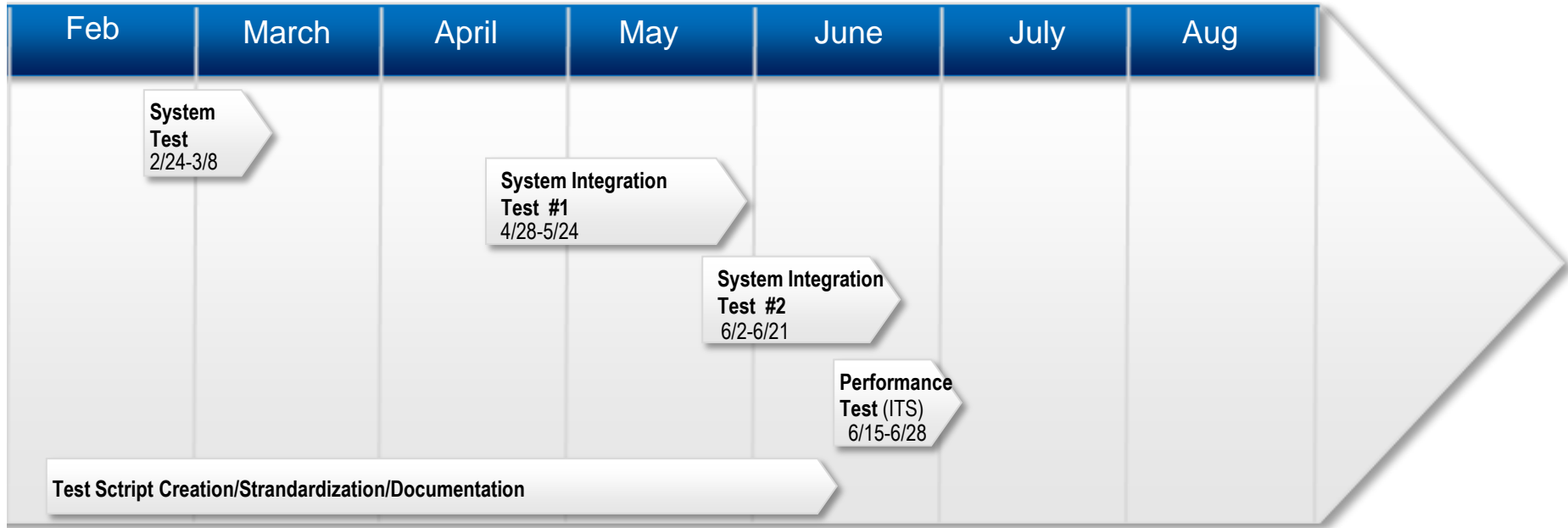
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What Does the Split Mean to You?

- Business Involvement



Business Involvement



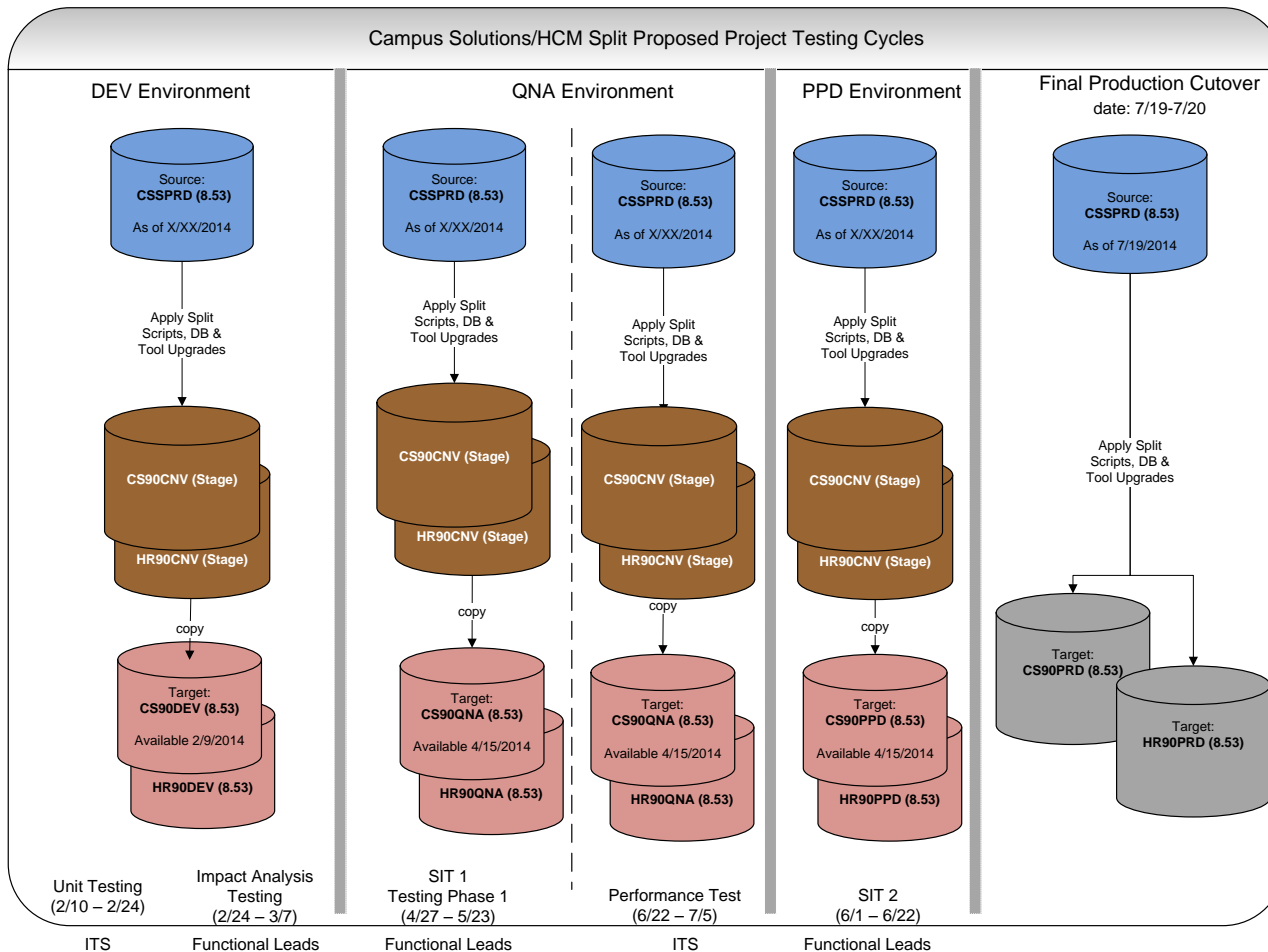
Project Time Line – Pending Approval

Week Beginning (Sunday Date):	Jan-19	Jan-26	Feb-2	Feb-9	Feb-16	Feb-23	Mar-2	Mar-9	Mar-16	Mar-23	Mar-30	Apr-6	Apr-13	Apr-20	Apr-27	May-4	May-11	May-18	May-25	Jun-1	Jun-8	Jun-15	Jun-22	Jun-29	Jul-6	Jul-13	Jul-20
Week Number	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28
Phase Initialize																											
Activity Split Planning & Startup	X	X	X	X																							
Activity Server/Environment Build	X	X	X																								
Phase Analyze, Design, & Development																											
Activity Configure CSS & HCM Environments				X																							
Activity Turn on delivered Integration Messages					X																						
Activity Initial System Test						X	X																				
Activity Fit/Gap Analysis & Development								X	X	X	X	X															
Activity Unit Test													X	X													
Phase Test Implement																											
Activity System Integration Testing, Phase 1													X	X	X	X											
Activity Defect Resolution																	X										
Activity System Integration Testing, Phase 2																		X	X	X							
Activity Performance Test																					X	X					
Activity Training/ Defect Resolution																					X	X	X	X			
Activity Go-Live																											
Projected Go-Live –																											
7/19/2014 – 7/20/2014																											



PROPOSED

Project Time Line – by Environment



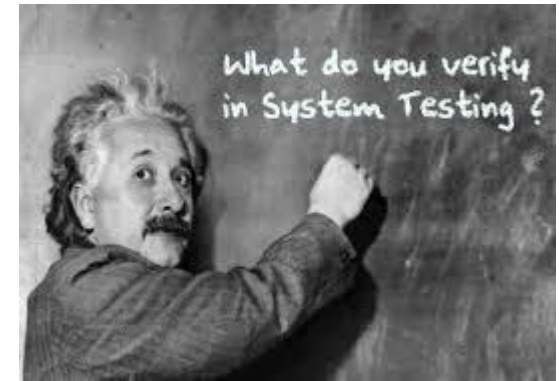
*Note: After each environment build, data refresh, or restore an initial series of "smoke" tests will be performed by ITS to validate connectivity, staging of data, and overall completeness of an environment before handing off to users.

PROPOSED

New Project Management Steps

What will be new?

- Testing Strategy
 - Formal test scripts with expected outcomes
 - Ensuring repetition
 - CRP Approach – Highly encouraged
- Testing Score Card
 - Visibility to test case execution and defect rate
- Infrastructure Performance Testing
 - Ensure the new environment performs as expected for the enrollment windows



Sample Test Script

<u>Number</u>	<u>Areas</u>	<u>Test Script</u>	<u>Expected Result</u>	<u>Status</u> Pass, Fail, Pending	<u>Comments</u>	<u>Predecessor</u>	<u>Dependent</u>
1	Registering for credit courses with active status	Student attempts to register with an admission status of Ready to Register (RR)	allowed to register	PASS	Student 0449026		
2		Student attempts to register for a course without an admission application on file	Error msg received, NOT allowed to register	PASS	Student 1074295; when entering RGN, end user is taken to RGPE screen. Unable to access RGN template (screenshot #2)	ADM-37	
3		Student attempts to register for a credit course with only a CEWD application on file	Error msg received, NOT allowed to register	PASS	Student 1015097 attempts to enroll into Beginning Algebra I & unable to register (see screenshots #3)		
17	Registering for courses with prerequisites	Student has credit on their transcript that meets prerequisites	allowed to register	PASS	Student 0896617 was able to enroll in ECON 1110 since she had taken Math 100 (see screenshot #17)		FA-44
18		Student has non-course equivalents on their record that meet prerequisites	allowed to register	FAIL	Student 0450033 was still unable to enroll. We added SPAN P1102 in STAC too (see screenshot #18)		

SAMPLE

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Testing Scorecard

Testing Scorecard			System Test (February 14')		Integration Test Round #1 (May 14')				Integration Test Round #2 (June 14')					Follow up needed
System	Area/Module	Subject Matter Experts	Total Test Scripts	Tests Executed	Total Test Scripts	Tests Executed	# of Mod's Tested	# of Defects	Total Test Scripts	Tests Executed	# of Mod's Tested	# of Defects	% of Scripts Tested	
PeopleSoft	Admissions	Name 1	13	12	70	70	-	-	66	66	-	-	100%	continue regression testing
PeopleSoft	Fin Aid	Name 2	128	21	34	34	-	-	92	84	-	-	91%	continue efforts to resolve differences
PeopleSoft	Student Life	Name 3	18	-	23	15	-	-	23	3	-	-	13%	continue efforts to resolve differences (7/14)

TOTALS	809	305	724	544	**10	9	1114	819	16	3		
% of Completion		38%		75%				74%				

SAMPLE



- Vacation Schedules
 - Please communicate all scheduled vacations ASAP
 - Coordination is key
- Projected Black Out Periods
 - 7/7/2014 – 8/2/2014
 - 2 weeks before and 2 weeks after Go-Live Weekend – 7/19/2014
 - Exceptions will be coordinated / approved as one offs

Split Project Estimated Hours

By Phase

Activity Name	Total Hours
Campus Solutions Split	10,200
CS Split Design	3,264
CS Split Integration Development	2,958
System-Integration Test	1,530
User Acceptance Test	918
Performance Test	510
Training/Change Management	510
Deployment	510

By Resource

Role	Hours Estimate
PeopleSoft Administrator	1000
Database Administrator	800
Functional SMEs	1200
Security Lead	1200
Developers	1500
Communications/Training	600
HCM/CS Split Consultant	1300
Project Management (Overall)	1600



- Project Team Involvement
- Quality Work
- Celebrating the Milestones



The Plan for Success

- Project Success will come from balancing multiple priorities, not declaring one over the other
- Communicating early and often will avoid last minute “Hail Mary's”



Projects In Progress as of 2/2/2014:

EAB	FACES
Noel-Levitz	Agilon One Application Road Map
CashNet Redeployment	FalconInfo Phase 1 - Student Reporting
Canvas Communities	Grants Pre-Approval Process - SmartERP Implementation
Book Store Opt-In Changes	

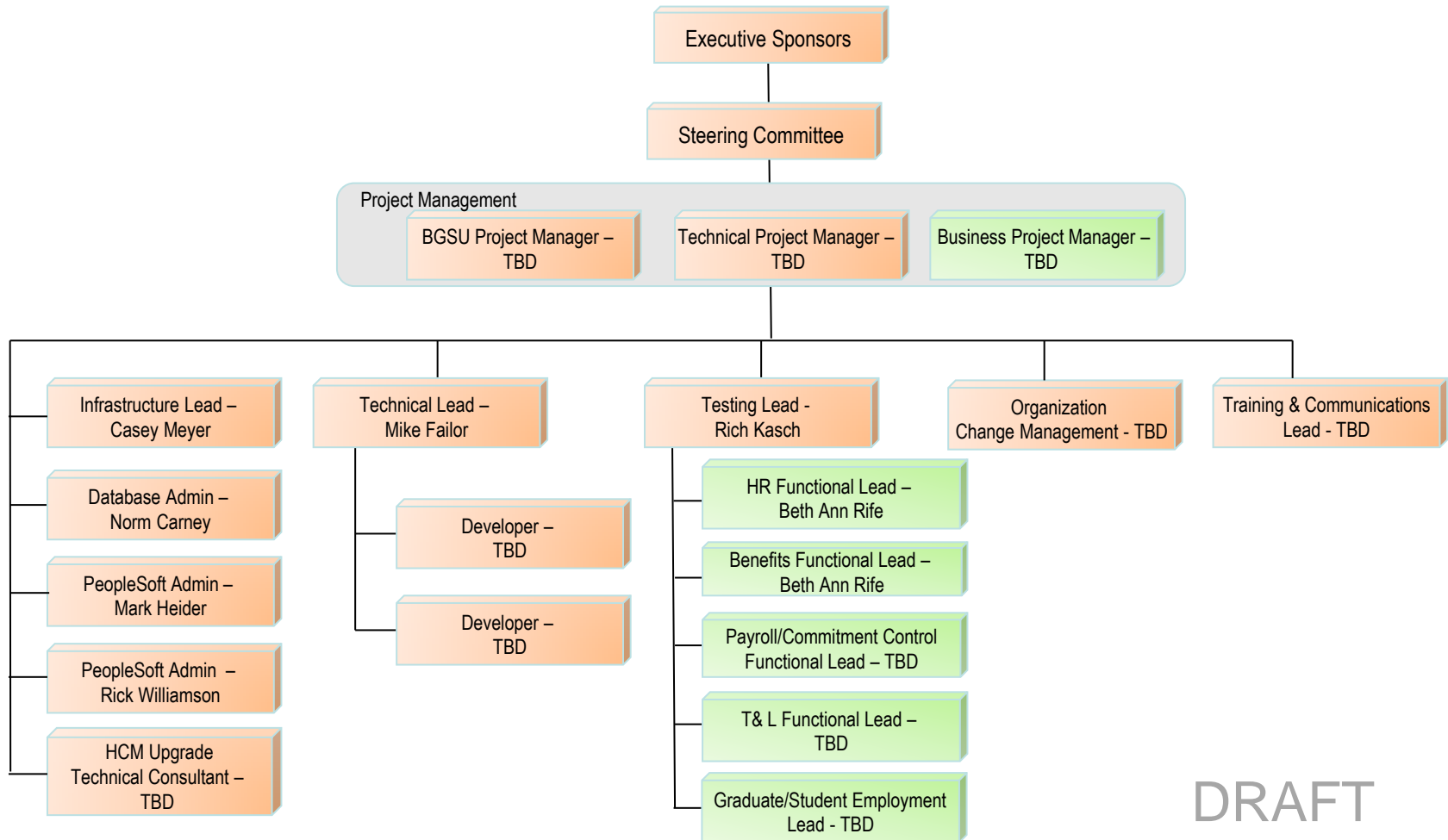
NEXT STEPS FOR THE LONG RANGE PROJECT

Planning - Planning - Planning

Planning for the Next Phases

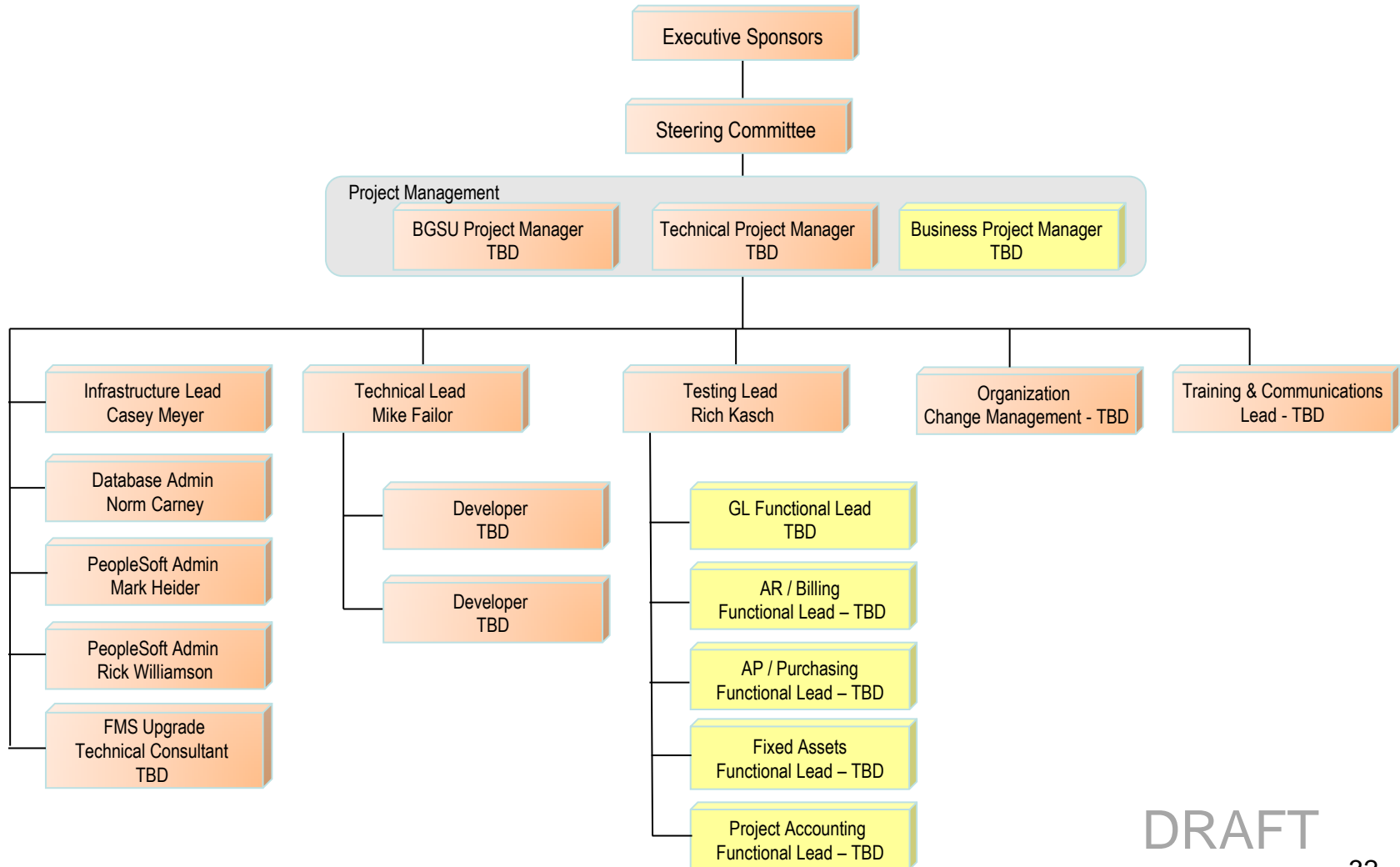
- 3 Year Application Road Map
- 1 Year of successful project deliveries
- Planning
 - HCM 9.2 Upgrade
 - FMS 9.2 Upgrade
 - Implementation of the Interaction Hub (tool set)

PeopleSoft HCM Upgrade Project Organization



DRAFT

PeopleSoft FMS Upgrade Project Organization



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Planning for The Next Phases

- HCM and FMS Upgrades have potentially far reaching impacts to business processes
 - New functionality brings efficiencies
 - Highly integrated ERP systems changes can impact other systems and processes
 - Standardized and documented testing will ease the efforts to test further application changes
 - Scope of HCM and FMS Upgrade can shift total project effort dramatically, traditionally 30 ~ 40,0000 hours each



Communication Plan

A formal communication will be created and shared with the project team.

Project Meeting Structure

Kick Off Meeting – Monday, 2/3/2014 – Huntington Building

Project Sponsor Meeting – Tuesday (Every Other Tuesday)

Weekly Project Meeting – Tuesday (11 a.m. – Noon) – Technical Team and Functional Leads

Monthly QA Meeting (John Ellinger, Rebecca Ferguson, Joe Frizado, and Steve Paull - Navigator)

Executive Sponsors Meeting – Monthly – 2nd Monday of each month – Formal Update

Open Forums - Monthly Open Forums for project updates for all interested parties

Project Web Site

Project Time Line

Testing Schedule

Risk and Issues

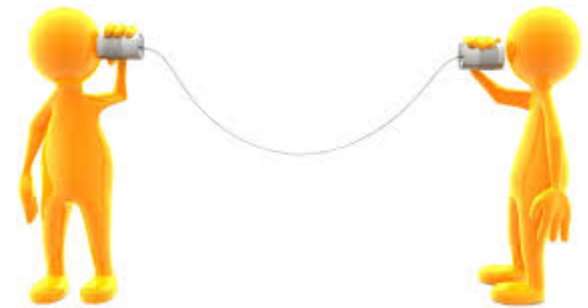
Team Communications

List Serves to be created to have a consistent communication channel

Project Announcements

BGNews

Updates to MyBGSU



Questions and Answers



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