PeopleSoft Road Map Project
The Way Forward

Phase 2
HCM 9.2 Upgrade
Business Transformation
May 29, 2014
Agenda

Background / Review
Where Are We?
Program Introduction
The Program – What Does This Mean to You?
Program Timeline and Approach
Program Organization and Delivery Model
Rules of Engagement
The Plan for Success
Upcoming Events
Questions
The History of the PeopleSoft Application Roadmap Project

Product Support End Dates

<table>
<thead>
<tr>
<th>Release</th>
<th>Extended Support Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSS 9.0</td>
<td>Dec-2018</td>
</tr>
<tr>
<td>CSS/HCM 9.0</td>
<td>Jun-2015</td>
</tr>
<tr>
<td>HCM 9.0</td>
<td>Jun-2015</td>
</tr>
<tr>
<td>HCM 9.1</td>
<td>Sep-2017</td>
</tr>
<tr>
<td>FMS 9.1</td>
<td>Nov-2017</td>
</tr>
<tr>
<td>Tools 8.51</td>
<td>Oct-2013</td>
</tr>
</tbody>
</table>
The Projected PeopleSoft Application Road Map

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

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

Updated 1/23/2013
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 – 8.5.3.06 – 1/6/2014
- Planning for the HCM upgrade
WHERE ARE WE?
**We are HERE**

The PeopleSoft Application Road – 3 year project

We have:
• successfully completed 1.5 years of activities

We are:
• on target
• moving forward

[Diagram showing timeline and milestones]
Program Planning Activities

- Oracle performed an HCM health check
- Reviewed 9.2 new functionality
- Held multiple scoping sessions with each business area
  - What works
  - What doesn’t
  - Identified opportunities for improvements
  - Identified areas that are nice to have
PROGRAM INTRODUCTION
Program Scope Introduction

What are we trying to accomplish?

- Upgrade the PeopleSoft HCM application to ensure supportability
- Increase business efficiencies
- Enhance automation
- Decrease and/or replace paper processes
- Replace de-centralized services with efficient centralized services
- Offer new functionality to improve student university services
- Tie to the AROC opportunities when appropriate
The Program

What does this mean to you?
<table>
<thead>
<tr>
<th>Area</th>
<th>Scope Definition</th>
<th>AROC Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits</td>
<td>Improve self-service functionality for life events and notification to employees of benefit changes. Improve the administration of event sequencing for the administrator.</td>
<td>3B</td>
</tr>
<tr>
<td>Core HR</td>
<td>Create electronic forms that are enabled with notifications, workflow and integrate data. Improve the pay change process with integration to accommodate Summer Pay addendums.</td>
<td>3B, 3C</td>
</tr>
<tr>
<td>Student Employment &amp; Graduate Contracting</td>
<td>Streamline hiring and related processes to unify practices (where appropriate) and incorporate workflows and notifications to students and employers.</td>
<td>3B</td>
</tr>
<tr>
<td>Payroll, Time &amp; Labor</td>
<td>Improve the time approval process and reduce the effort it takes to administer security rules for new supervisors approvals. (Includes staff and student employees)</td>
<td>3B</td>
</tr>
<tr>
<td>Campus Wide / University</td>
<td>Improve the provisioning process to streamline the on-boarding and off-boarding process. Improve the interaction between HR data and the end users by removing reporting obstructions, and enabling delegate access. (Includes GA and student employee processes)</td>
<td>3B</td>
</tr>
</tbody>
</table>
The Magic Quadrant

**Areas Impacted**
- Payroll
- Human Resources
- Benefits
- Graduate / Student Employment
- Employees
- Campus Wide

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### Benefit

- **A1. Benefits – Event Sequence**
- **A2. Benefits – Life Events**
- **A3. Benefits – Enrollments**

- **B1. HR – Notification Process**
  (Department and Location)
- **B2. Employee Self Service**
- **B3. Pay Changes / Job Data Changes / Pay Group Changes**
- **B4. Other Employee Affiliations**
- **B5. On-Boarding / Off-Boarding**
- **B6. Summer Pay**
- **B7. Delegated Access**

- **C1. SES – e-Hire Notifications**
- **C2. SES – On-Boarding**
- **C3. OPERS Enrollment**
- **C4. FWS Calculations**
- **C5. SES – Employee Data Mgmt.**

- **D1. Time & Labor**
- **D2. Commitment Accounting**
- **D3. Budget – Contract Addendums**
- **D4. ePay**

- **E1. Guest (Guardian/Parent) Access**
- **E2. Security Requests**
- **E3. Row Level Security**
- **E4. Reporting**
- **E5. On-line Training Tracking**

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**Continental Divide**

- **Help Desk (Call Center)**
- **ePerformance, Absence Management, Learning Management (eLearning), eCompensation, G-Hire changes, Interaction Hub**

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**Level of Effort**

### Areas Impacted
- Payroll
- Human Resources
- Benefits
- Graduate / Student Employment
- Employees
- Campus Wide

*Circle size reflects priority as Low, Medium, High*
Program timeline & Approach
Program Workstreams

Executive Sponsors

Quality Assurance Oversight

Program Steering Committee

Program

HCM 9.2 Upgrade
Margo Kammeyer - PM

Automation
Mgr of Aux Services - PM

Guest Access
Rich Kasch - PM

Reporting
Mgr of Ent. Rpting - PM

Support Services (Infrastructure, Communications & Training)
PROGRAM DELIVERY MODEL

Governance Structure
Program Governance Structure

Executive Sponsors

Quality Assurance Oversight
B. Ferguson  M. Simmons  J. Ellinger  S. Swartz  B. Leigh

Program Steering Committee
P. Short  S. Kellogg  D. Chong  B. Rife  C. Cox  M. Haschak  A. Grant  V. McCarver  C. McCartney  B. Swanson  L. Emch

Program Management Structure
Sheri Kellogg

HCM 9.2 Upgrade
Margo Kammeyer - PM

Automation
ITS Mgr Aux Services

Guest Access
Rich Kasch - PM

Reporting
ITS Mgr Ent Rptng

Bowling Green State University
HCM 9.2 Upgrade Workstream
HCM 9.2 Upgrade Project Highlights

Core HR / Student Employment Services
  - Traditional Upgrade
  - Remove Row Level Security
  - Guest Affiliations
  - Student Employment OPERS and FWS Determinations

Time & Labor / Payroll
  - Delegation / Time Approvers
  - Email Notification to Approve Payroll
  - Payroll Funding Caps
  - Change to PDF Paycheck View
  - Summer Pay Changes
HCM 9.2 Upgrade Project Highlights – cont’d

Benefits

- Life Event Changes
- Disability
- Core Competencies - Training
HCM 9.2 Upgrade - Structure

Executive Sponsors
  - QA Oversight
  - Steering Committee
  - Program Manager Sheri Kellogg

BGSU Project Manager Margo Kammeyer
  - Technical Project Manager Todd Warner

- Time & Labor / Payroll SME David Weimer
  - Core HR / SES SME Beth Ann Rife / Jason Dunn Michele Schmitz
    - Core HR / SES ITS Lead Mike Failor
    - Technical Lead Raghu Chittari
  - Benefits SME Beth Ann Rife / Jason Dunn Sandy Heck
    - Benefits ITS Lead TBD
    - Technical Lead Sandyha Nair

Development Lead Todd Glick
  - Testing Lead Rich Kasch
  - Communications Lead Cindy Fuller
  - Security Lead David Hayes
  - PeopleSoft Admins
  - Infrastructure Lead
  - Database Admin
  - Training Lead Patrick Lisk

Subject Matter Experts / Project Stakeholders

BOWLING GREEN STATE UNIVERSITY
HCM 9.2 HCM Environments

HCM 9.2 Proposed Project Environments

DEV Environment
Source: CSSPRD (8.53)
As of 5/30/2014

- Apply Application Upgrade Script
- Unit Testing (7/27 - 11/8)
- Target: HCM92DEV (8.53)
Available 7/19/2014

QNA Environment
Source: HCMPRD (8.53)
As of XOOO/2014

- Apply Application Upgrade Script
- System Testing (11/9 - 12/13)
- Target: HCM92QNA (8.53)

PPD Environment
Source: HCMPRD (8.53)
As of XOOO/2014

- Apply Application Upgrade Script
- Integration Testing (12/14 - 1/31)
- Target: HCM92PPD (8.53)

Final Production Cutover
Date: 3/21/15
Source: HCMPRD (8.53)
As of 7/19/2014

- Apply Application Upgrade Script
- Payroll Parallel (2/1 - 2/28)
- Target: HCM92PPD (8.53)
Delivery Timeline
GUEST ACCESS WORKSTREAM
Guest Access Project Highlights

- PeopleSoft delivered functionality
- Parent Portal
- Electronic FERPA
- Transactions to Configure
  - Contact Information (phone number, email, addresses)
  - Emergency Contacts
  - To Do List
  - Holds
  - CashNet (custom configuration)
Guest Access - Structure
Guest Access Terminology

User delegates a third party access to its own data. This person can then view or perform some actions on behalf of the user.

**Terminology**

- Parental Access
- Component(s) to delegate
- Student
- Parent

- Delegated Access
- Transaction
- Delegator
- Proxy
Guest Access – How Does It Work?

An Overview of the Delegated Access Process

The diagram illustrates an overview of the delegated access process:

1. **Setup**
   - Define what can be delegated

2. **Delegator**
   - Delegator delegates access to a proxy

3. **System**
   - Both Delegator + proxy are notified at the time of delegation.

   Proxy email includes a URL to access school system.

4. **Proxy**
   - Proxy uses an existing User ID or creates a new one

   Proxy accepts the Terms & Conditions and SUBMITS

5. **Proxy user experience**
   - Proxy navigates to the “Shared Information Center”
AUTOMATION WORKSTREAM
Automation Highlights

• On-Boarding / Off-Boarding
• Fee Waivers
• SES Hiring process
• Centralizing application security requests / approvals
• Personnel action form
Automation - Structure

- Executive Sponsors
- QA Oversight
- Steering Committee
- Program Manager Sheri Kellogg
- BGSU Project Manager ITS Mgr Aux Services
- Technical Project Manager Matt Haschak / Andy Grant
- Web Development Lead Chris Wammes
- ITS - PeopleSoft Shawn Gurzynski
- Navigator Support David Hellman
- Testing Lead Rich Kasch
- Communications Lead Cindy Fuller
- Security Lead David Hayes
- PeopleSoft Admins
- Infrastructure Lead
- Database Admin
- Training Lead Patrick Lisk
REPORTING WORKSTREAM
Reporting Highlights

• Providing the delivery of the 10 top requested reports
• Providing a query and/or report to simplify reporting for all areas of campus (Academic and Administrative)
• Removing security constraints on existing PeopleSoft reports
• Extending the business analytics
Reporting - Structure

- Executive Sponsors
- QA Oversight
- Steering Committee
- Program Manager Sheri Kellogg
- Project Manager ITS Mgr Ent Reporting
- Data Warehouse Development team
  - Data Analytics Work Group
  - Report Writers
- Testing Lead Rich Kasch
- Communications Lead Cindy Fuller
- Security Lead David Hayes
- PeopleSoft Admins
- Infrastructure Lead
- Database Admin
- Training Lead Patrick Lisk

Subject Matter Experts / Project Stakeholders
Vacation Schedules
• Please communicate all scheduled vacations ASAP
• Coordination is key

HCM 9.2 Upgrade projected black-out periods
• March 16, 2015 – March 27, 2015
• These dates are 1 week before and 1 week after the HCM 9.2 Upgrade Go-Live scheduled for the weekend of March 21, 2015
• Exceptions will be coordinated / approved as one-offs

No black-out periods for other workstreams
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 5/28/2014
- CSS / HCM Split Project
- FACEs Phase 2
- Noel-Levitz 2A
- Agilon One Application Road Map
- BARS – Phase 1
- Bookstore Opt-in Changes
- Grants Pre-Approval Process – Smart ERP Implementation
- OnBase Upgrade
- Chrome River
**Plans for Communication**

**Project Meeting Structure**
- Kick Off Meeting – Wed. June 11 at 9 a.m. in 110 BA
- Bi-weekly Program Steering Meetings
- Weekly Project Meetings (determined by work stream) Technical Team and Functional Leads
- Monthly QA Meetings (Business Area Leadership Representation)
- Monthly Executive Sponsors Meetings – formal update

**Open Forums**
- Regular Open Forums for project updates for all interested parties

**Project Web Site – www.bgsu.edu/chess**
- Project Time Line
- Testing Schedule
- Risk and Issues

**Team Communications**
- Listservs to be created to have a consistent communication channel
Upcoming Events

Next Open Forum
CSS/HCM Split Go-Live
Thursday, June 19 at 2 p.m.
111 Hayes Hall

HCM Upgrade (Phase 2) Kickoff
Wednesday, June 11 at 9 a.m.
110 Business Administration

Project web site
www.bgsu.edu/chess

Project email address
CHESS-Project@bgsu.edu
Questions and Answers
Your input please…….

FIT – Falcon Information Transformation

FHIRST – Falcon HCM Information and Reporting System Transformation

BHOAT – Business HCM Organization Automation and Transformation

HABIT – HCM Automation and Business Information Transformation

Send suggestions to the Project email address CHESS-Project@bgsu.edu