

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

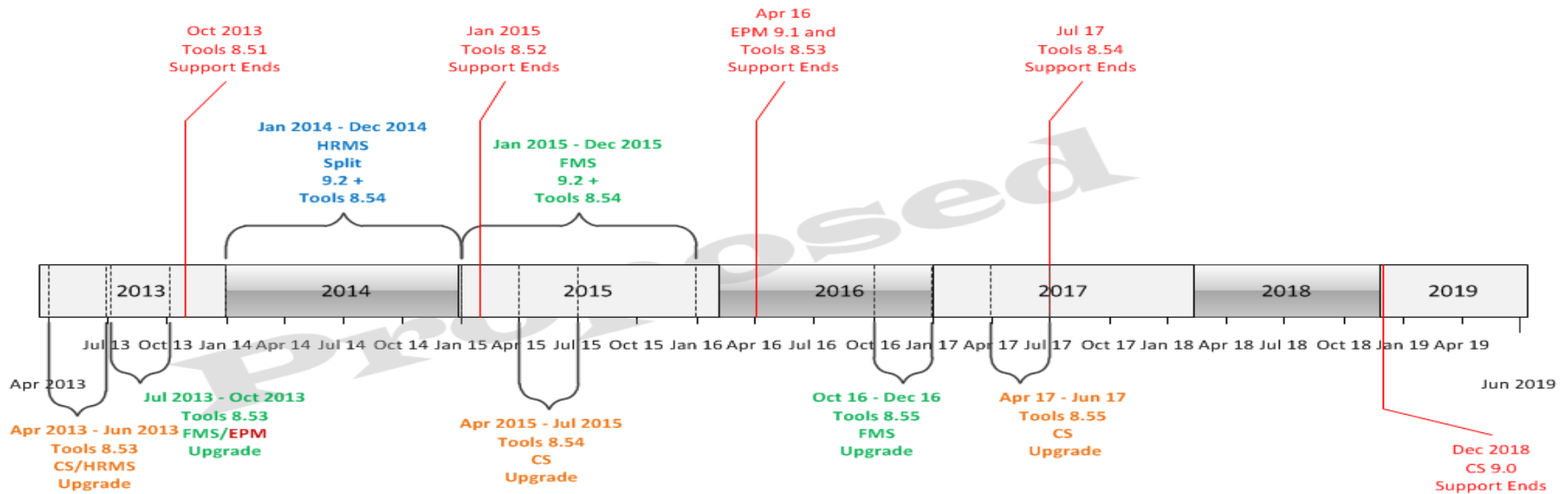
Product Support End Dates

Release	Extended Support Ends
CSS 9.0	Dec-2018
CSS/HCM 9.0	Jun-2015
HCM 9.0	Jun-2015
HCM 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.

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
- Formal “Split” Kick-off – 2/3/2014 (Go-Live – 7/19/2014)
- Planning for the HCM upgrade

WHERE ARE WE?

We are *HERE*

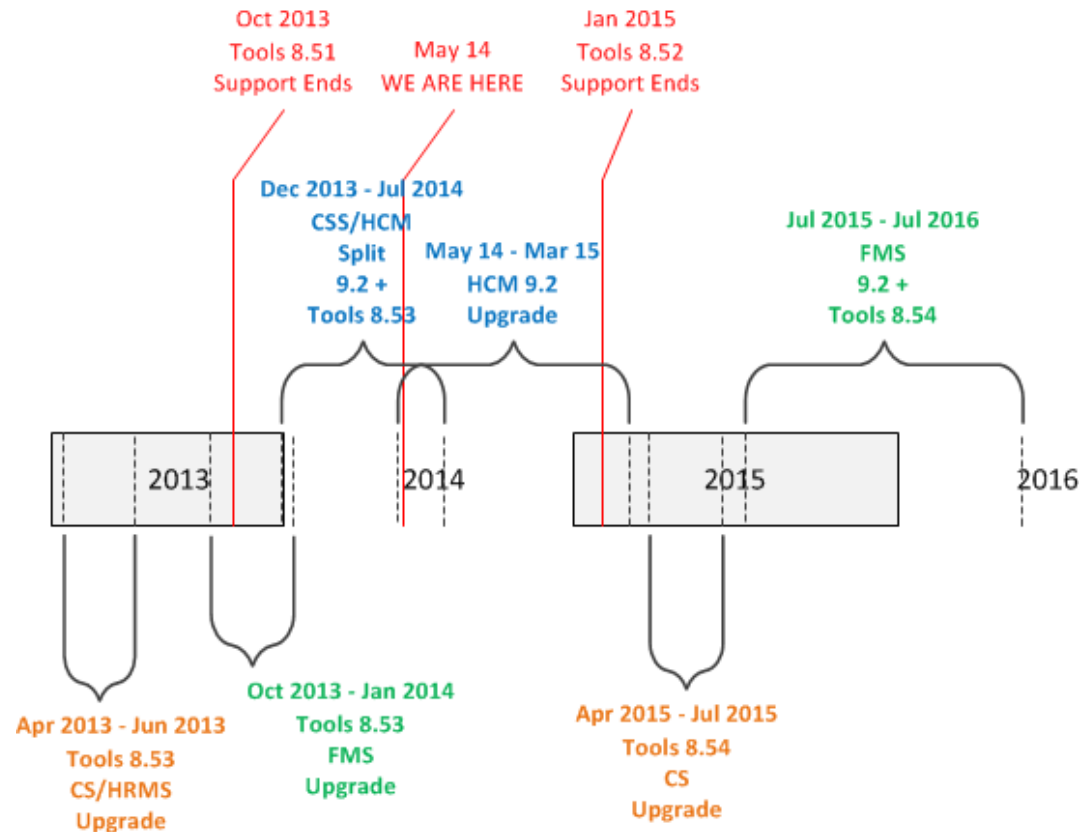
The PeopleSoft Application Road – 3 year project

We have:

- successfully completed 1.5 years of activities

We are:

- on target
- moving forward



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?

Program Scope

Area	Scope Definition	AROC Reference
Benefits	Improve self-service functionality for life events and notification to employees of benefit changes. Improve the administration of event sequencing for the administrator.	3B
Core HR	Create electronic forms that are enabled with notifications, workflow and integrate data. Improve the pay change process with integration to accommodate Summer Pay addendums.	3B, 3C
Student Employment & Graduate Contracting	Streamline hiring and related processes to unify practices (where appropriate) and incorporate workflows and notifications to students and employers.	3B
Payroll, Time & Labor	Improve the time approval process and reduce the effort it takes to administer security rules for new supervisors approvals. (Includes staff and student employees)	3B
Campus Wide / University	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)	3B

AROC References:

3B: Redesign Key Administrative Data and Processes

3C: Implement BGSU-wide SaaS CRM and ERP Systems

The Magic Quadrant

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

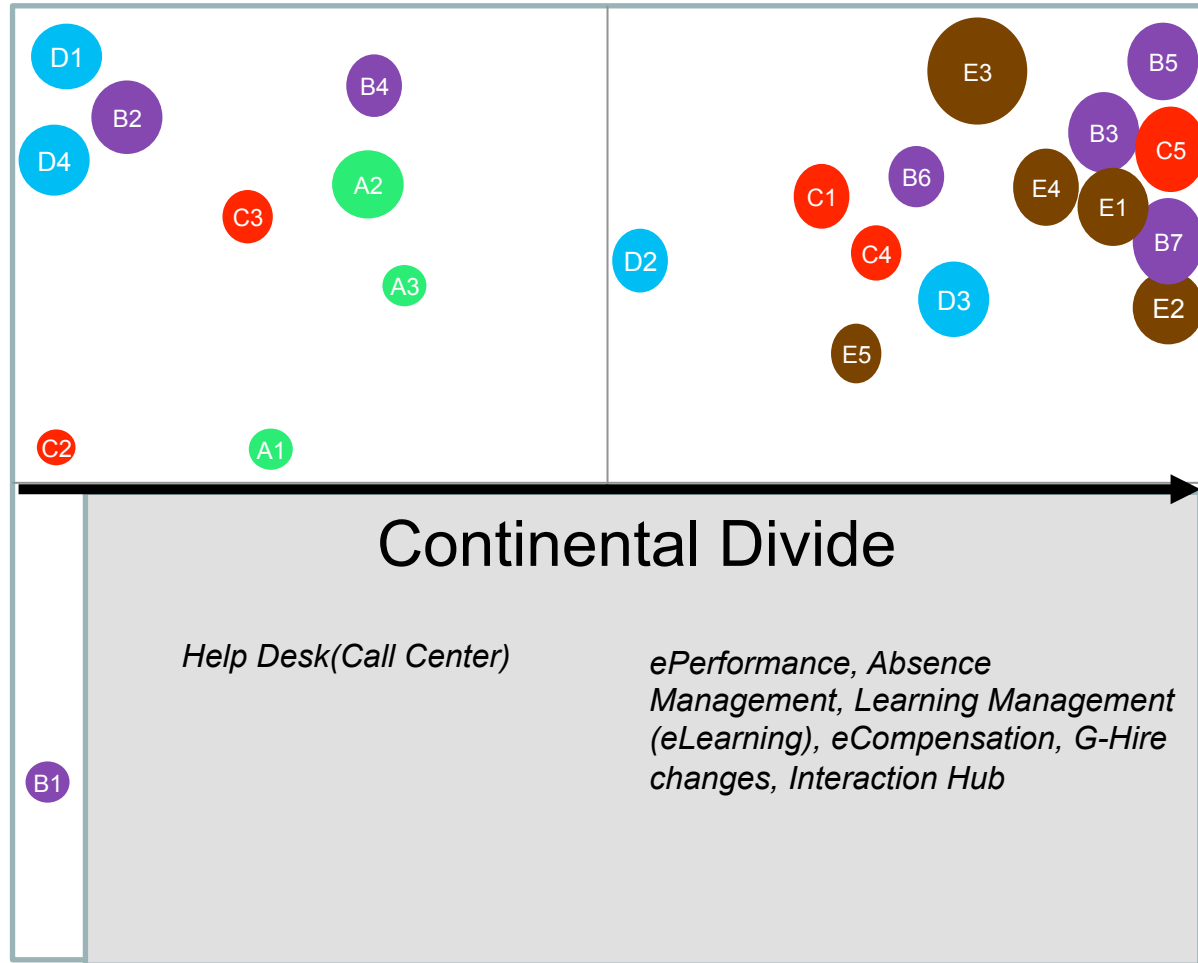
- B1. HR – Notification Process (Department and Location)
- B2. Employee Self Service
- B3. Pay Changes / Job Data Changes / Pay Group Changes
- B4. Other Employee Affiliations
- B5. On-Boarding / Off-Boarding
- B6. Summer Pay
- B7. Delegated Access

- 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

Benefit



Level of Effort

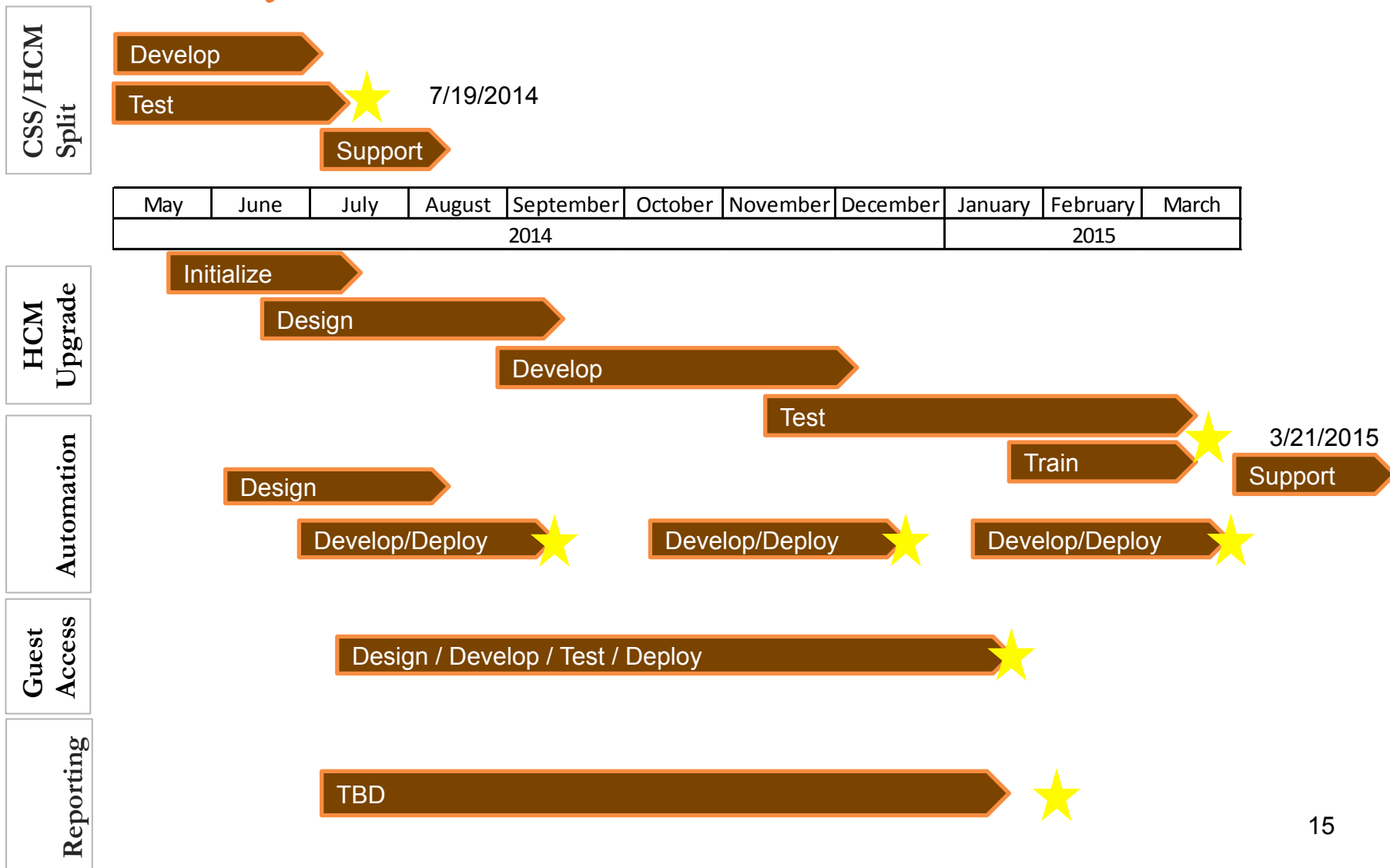
Areas Impacted

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

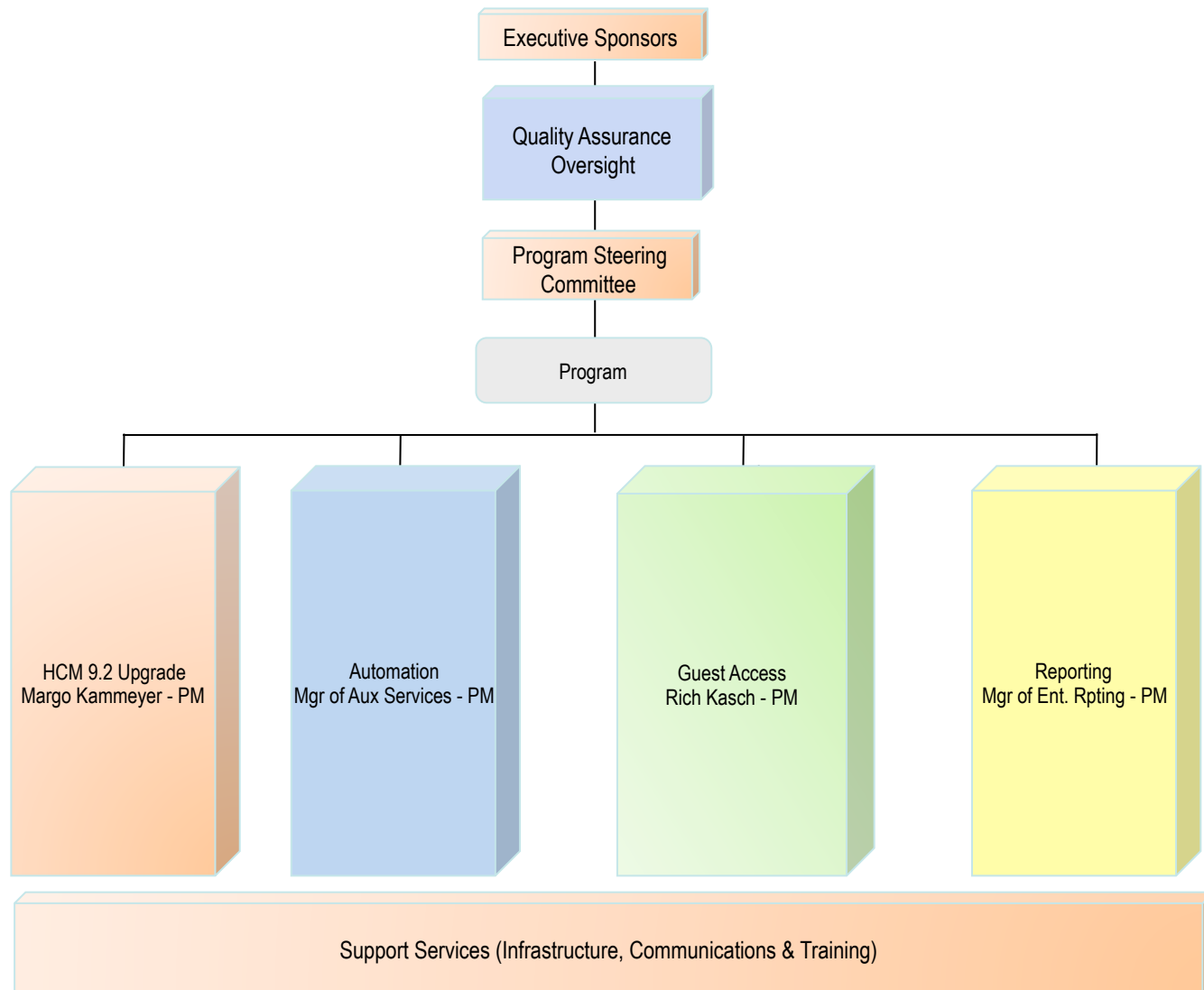
*Circle size reflects priority as Low, Medium, High

PROGRAM TIMELINE
&
APPROACH

Delivery Timeline



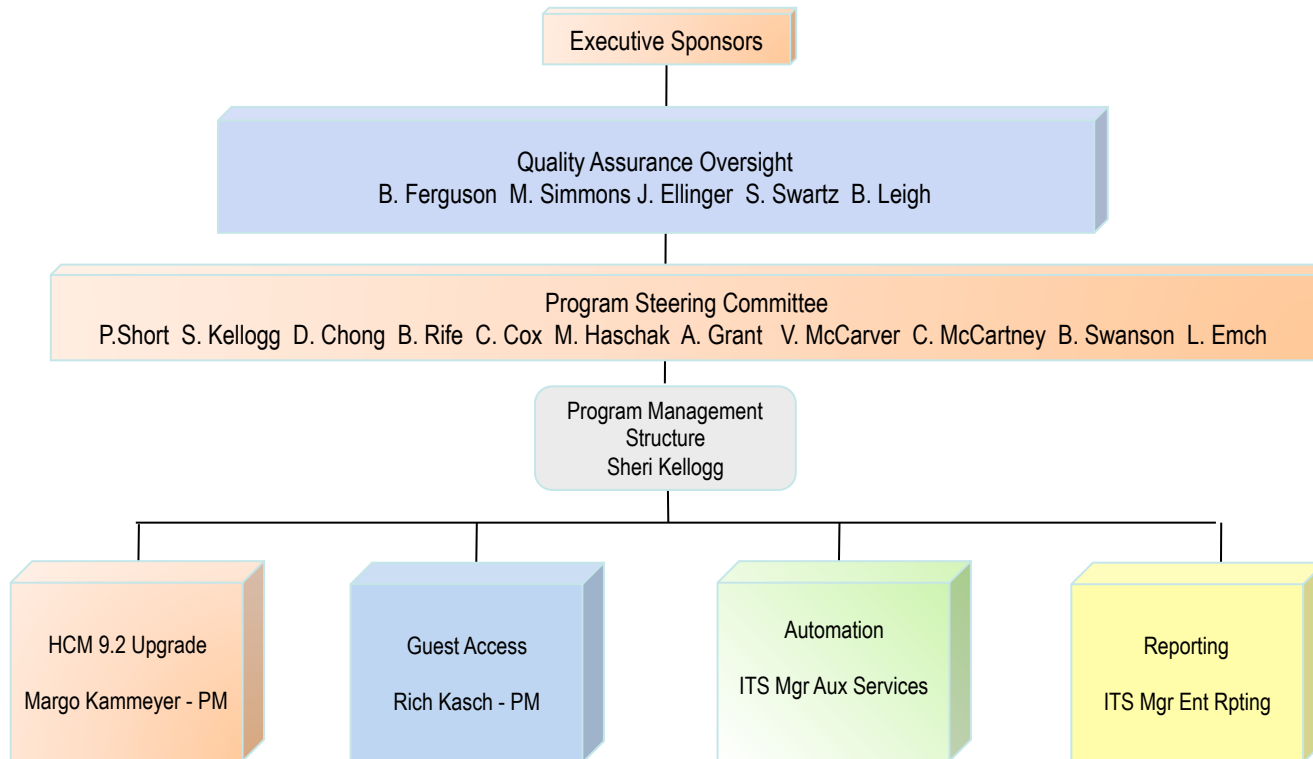
Program Workstreams



PROGRAM DELIVERY MODEL

Governance Structure

Program Governance Structure



*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

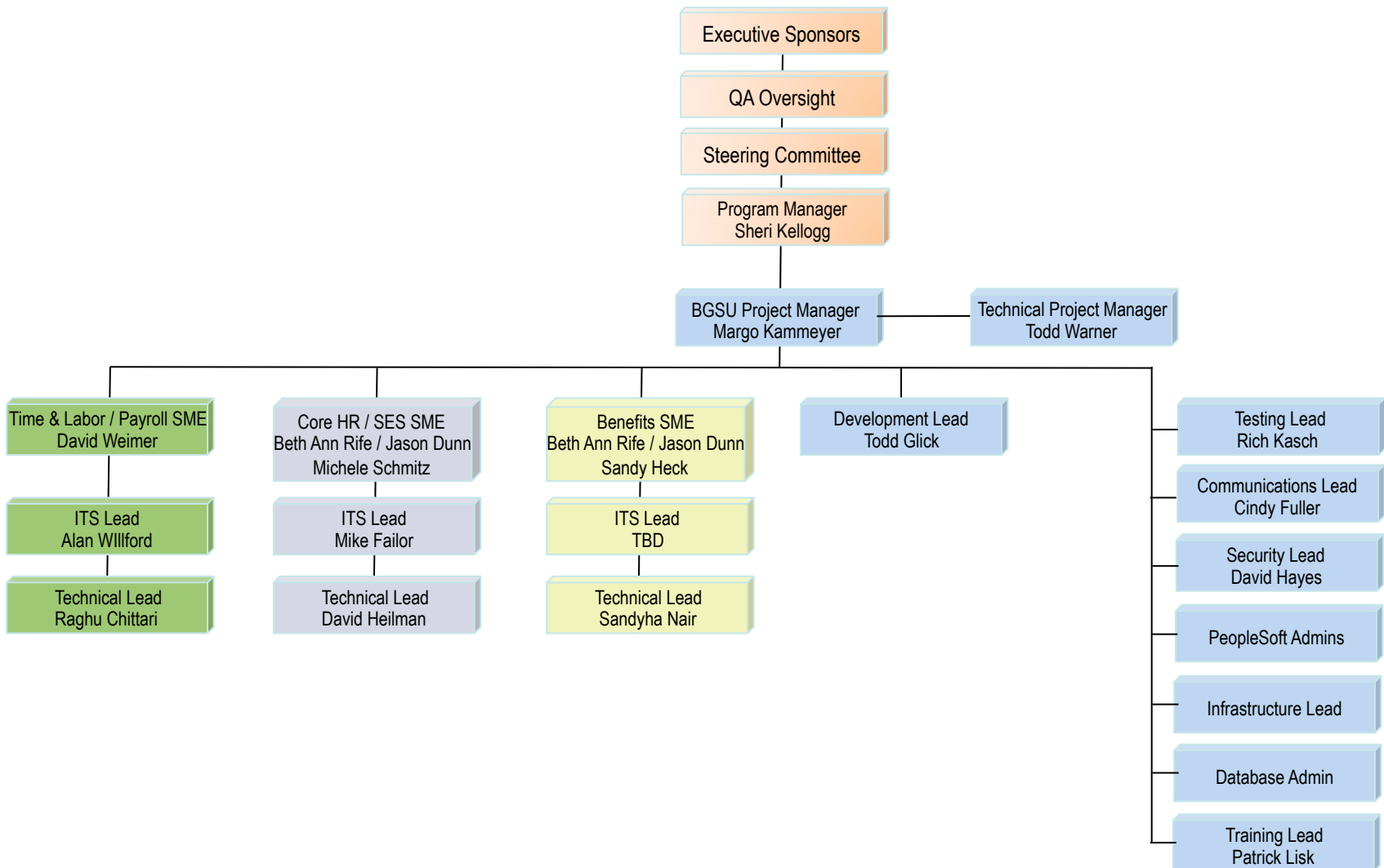
- Delegation / Time Approvers
- Email Notification to Approve Payroll
- Payroll Funding Caps
- Change to PDF Paycheck View
- Summer Pay Changes

HCM 9.2 Upgrade Project Highlights – cont'd

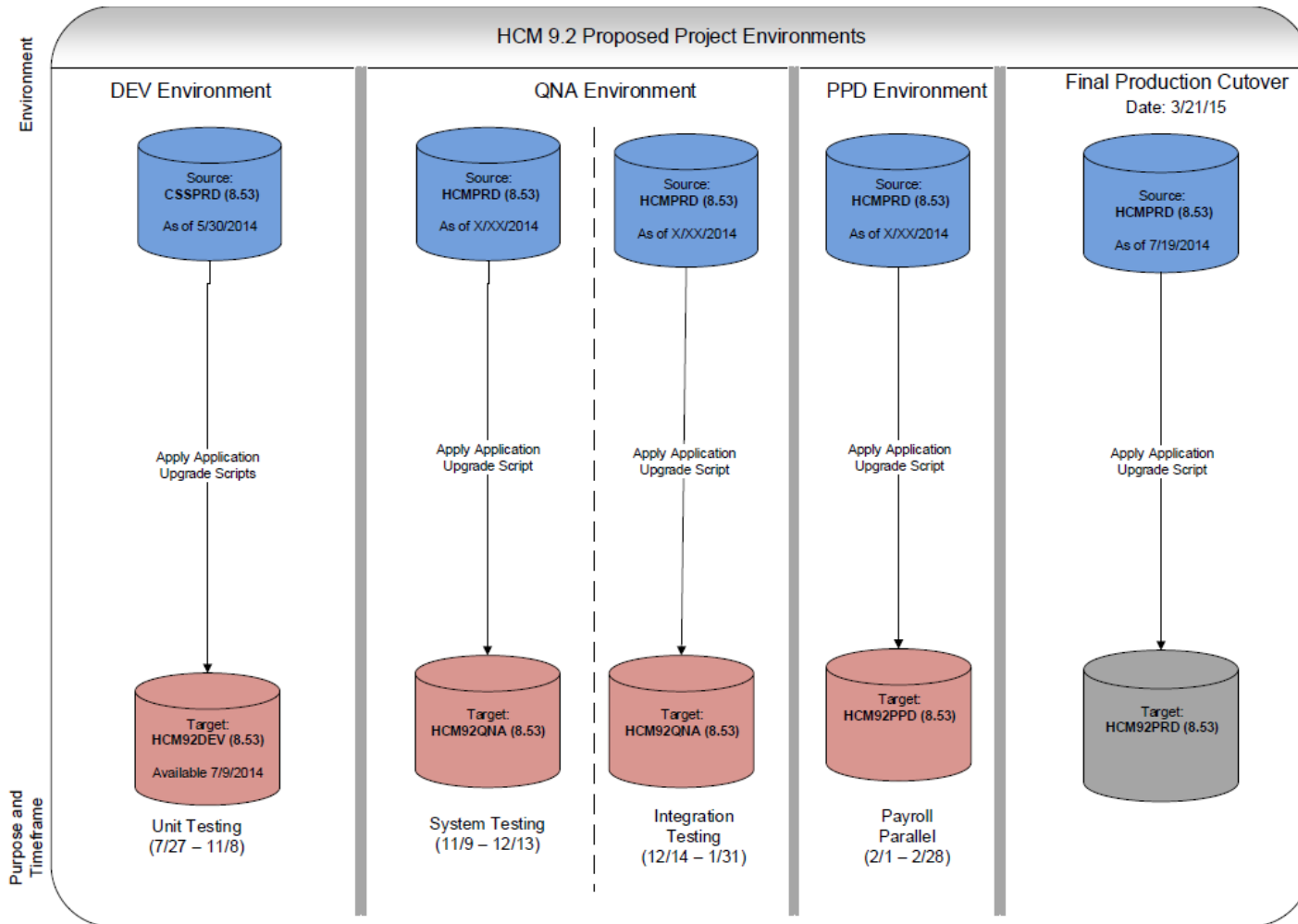
Benefits

- Life Event Changes
- Disability
- Core Competencies - Training

HCM 9.2 Upgrade - Structure

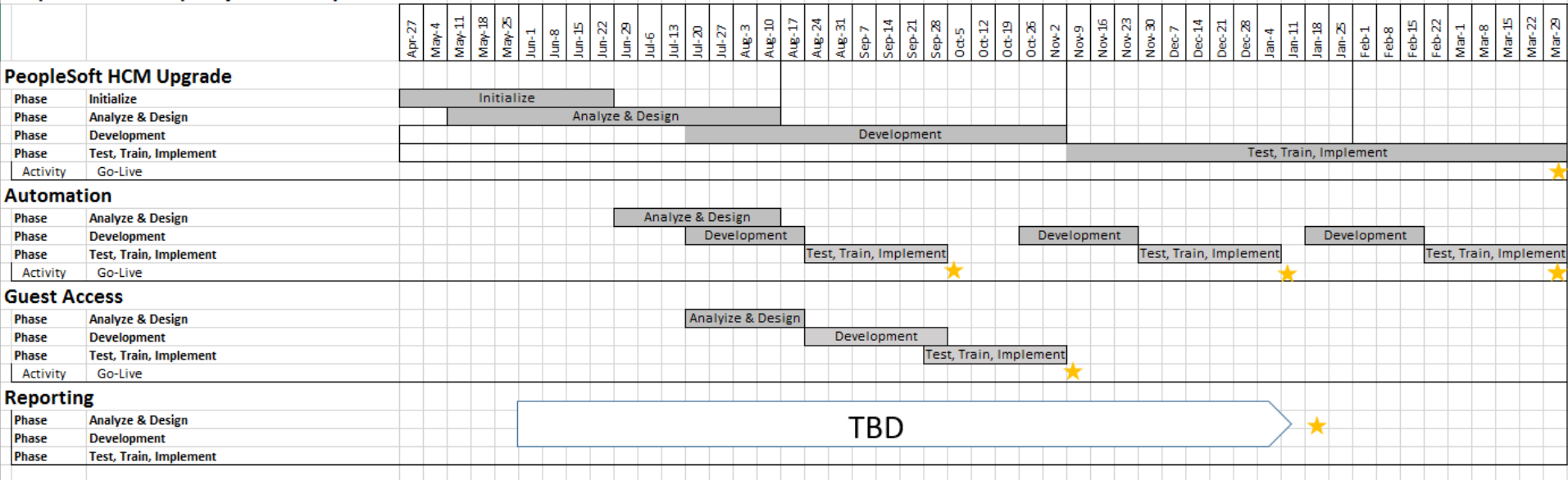


HCM 9.2 HCM Environments



Delivery Timeline

PeopleSoft Roadmap Project Delivery Timeline

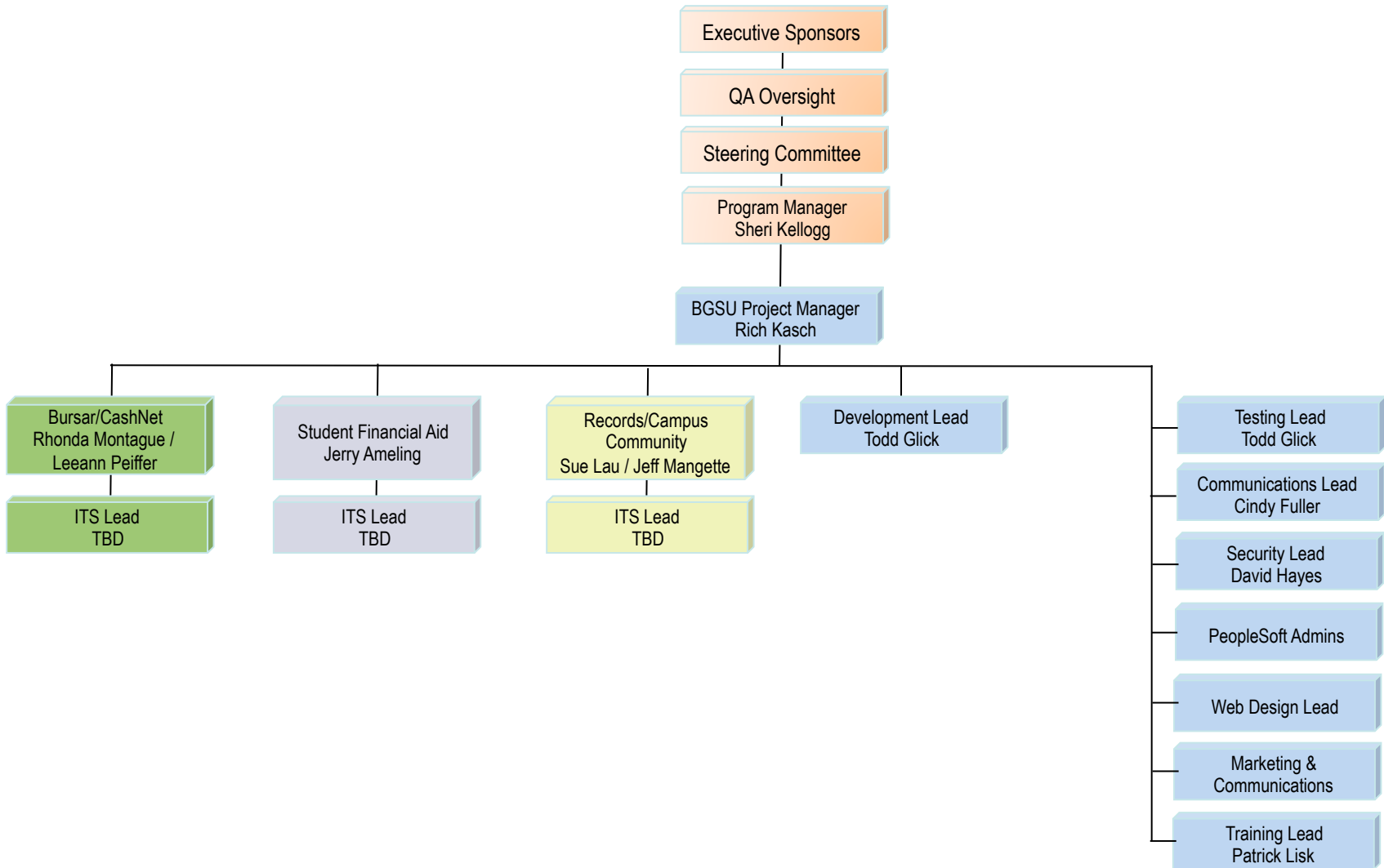


*GUEST ACCESS
WORKSTREAM*

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.

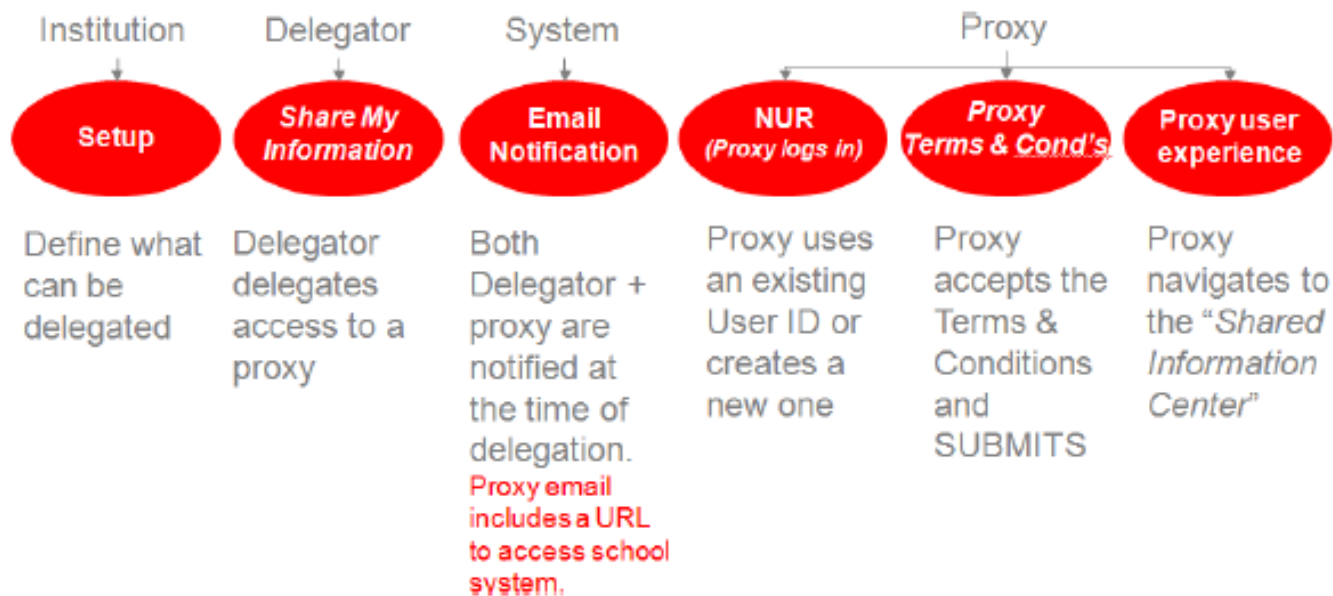
Terminology

- Parental Access ➤ **Delegated Access**
- Component(s) to delegate ➤ **Transaction**
- Student ➤ **Delegator**
- Parent ➤ **Proxy**

Guest Access – How Does It Work?

An Overview of the Delegated Access Process

The diagram illustrates an overview of the delegated access process:

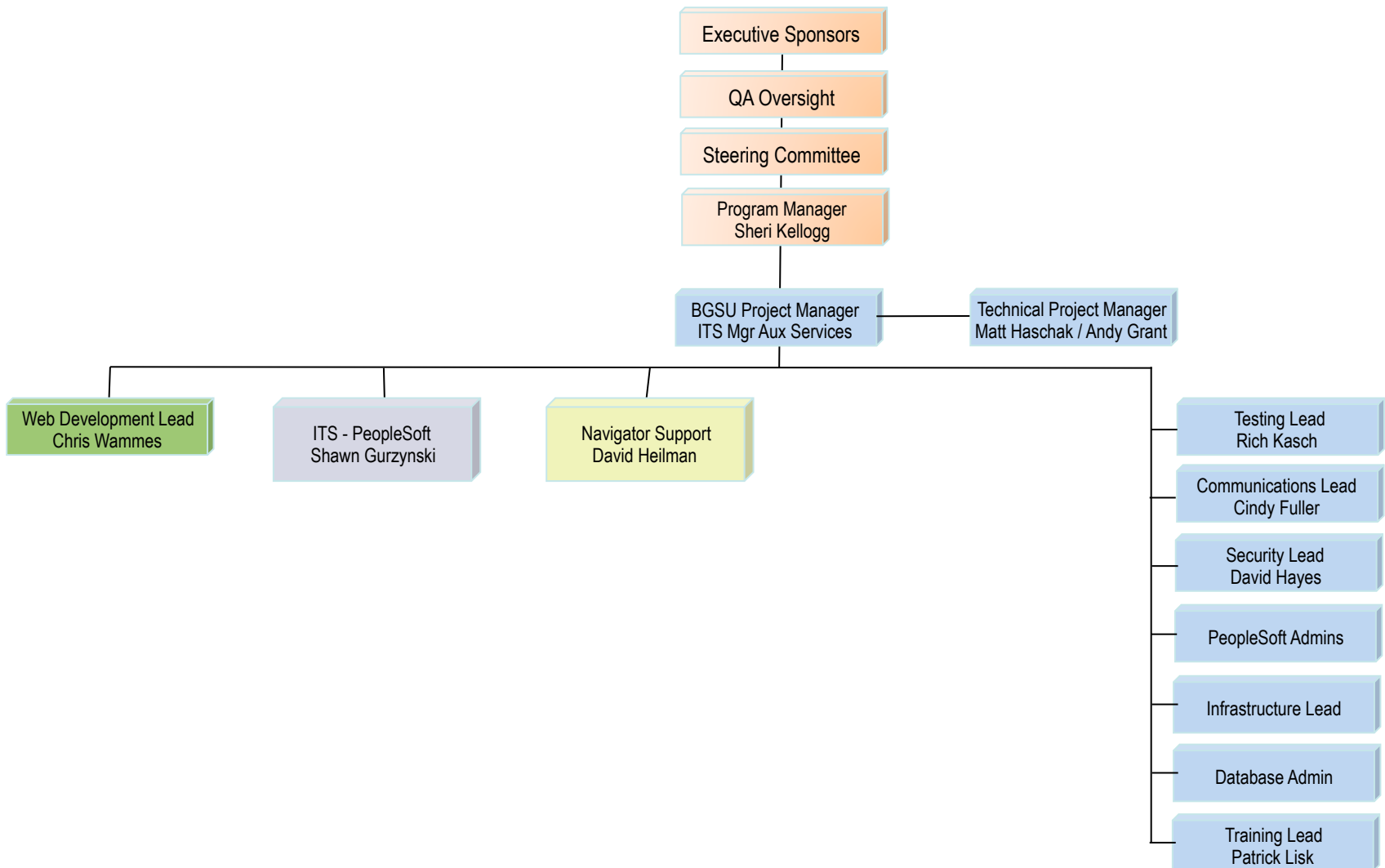


*AUTOMATION
WORKSTREAM*

Automation Highlights

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

Automation - Structure

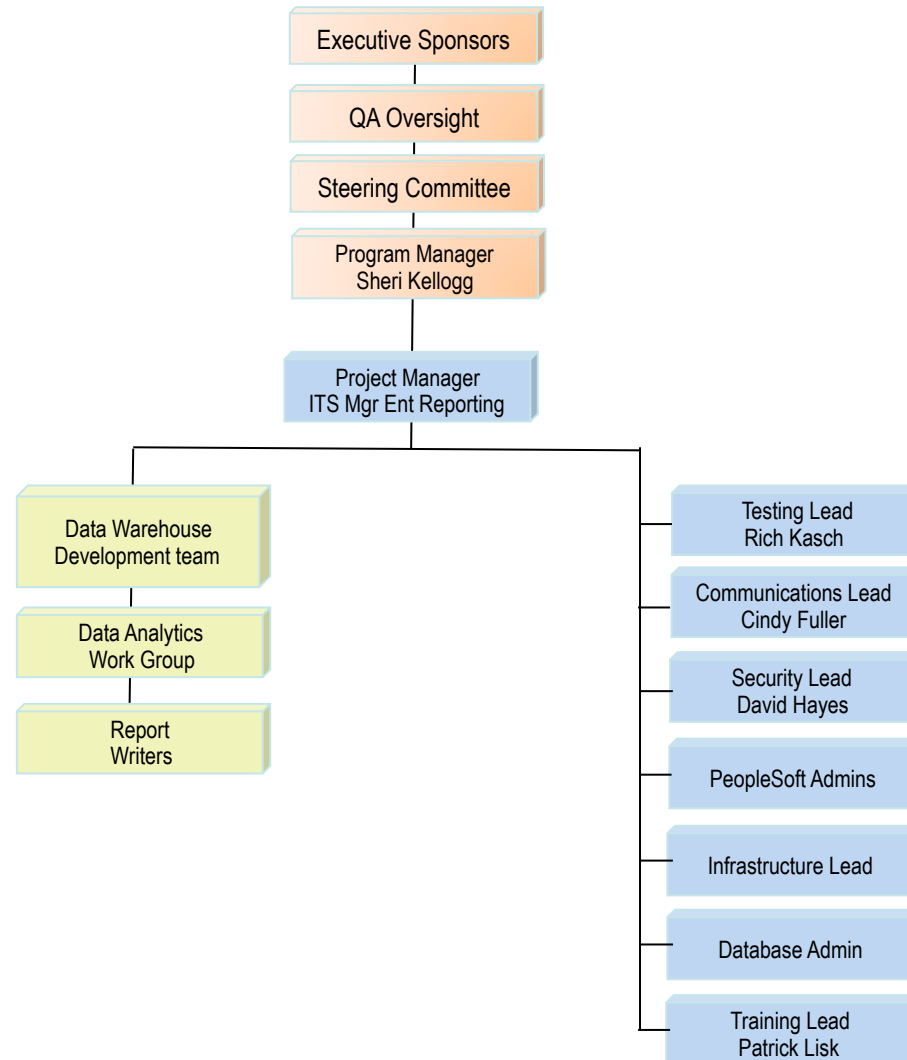


*REPORTING
WORKSTREAM*

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





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



www.clipartof.com · 75379

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