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

<table>
<thead>
<tr>
<th>Release</th>
<th>Extended Support Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>CS 9.0</td>
<td>Dec-2018</td>
</tr>
<tr>
<td>CS/HRMS 9.0</td>
<td>Jun-2015</td>
</tr>
<tr>
<td>HRMS 9.0</td>
<td>Jun-2015</td>
</tr>
<tr>
<td>HRMS 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

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

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.
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

- Apr 2013 - Jun 2013
  Tools 8.53
  CS/HRMS Upgrade

- Oct 2013
  Tools 8.51
  Support Ends

- Jan 14
  WE ARE HERE

- Jan 2014 - Dec 2014
  HRMS Split
  9.2 +
  Tools 8.54

- Jan 2015
  Tools 8.52
  Support Ends

- Dec 2014 - Dec 2015
  FMS
  9.2 +
  Tools 8.54

- Apr 2015 - Jul 2015
  Tools 8.54
  CS Upgrade
PROJECT TEAM ORGANIZATION STRUCTURE
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?

CSS/HCM

Split Project

Person Data

Data Integration

Job Data

CSS

HCM

Reports & Queries
What Does the Split Mean to You?

• Review of Customization

<table>
<thead>
<tr>
<th>Type of Customization</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interfaces</td>
<td>100</td>
</tr>
<tr>
<td>Customizations to Delivered Processes</td>
<td>88</td>
</tr>
<tr>
<td>New Bolt-On Processes/Components</td>
<td>73</td>
</tr>
<tr>
<td>Custom Reports</td>
<td>33</td>
</tr>
</tbody>
</table>

• Queries

<table>
<thead>
<tr>
<th>Queries</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Queries</td>
<td>11,844</td>
</tr>
<tr>
<td>Queries Executed &lt; 12 Months Old</td>
<td>6,973</td>
</tr>
<tr>
<td>Queries Executed &gt; 12 Months Old</td>
<td>4,871</td>
</tr>
</tbody>
</table>

• 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
What Does the Split Mean to You?

• Business Involvement
# Business Involvement

<table>
<thead>
<tr>
<th>Feb</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>Aug</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>System Test</strong> 2/24-3/8</td>
<td><strong>System Integration Test #1</strong> 4/28-5/24</td>
<td><strong>System Integration Test #2</strong> 6/2-6/21</td>
<td><strong>Performance Test (ITS)</strong> 6/15-6/28</td>
<td>Test Script Creation/Standardization/Documentation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Level of Effort**

- Low
- High
## Project Time Line – Pending Approval

### Phase: Initialize
- **Activity**: Split Planning & Startup
  - **Status**: X X X X
- **Activity**: Server/Environment Build
  - **Status**: X X

### Phase: Analyze, Design, & Development
- **Activity**: Configure CSS & HCM Environments
  - **Status**: X
- **Activity**: Turn on delivered Integration Messages
  - **Status**: X
- **Activity**: Initial System Test
  - **Status**: X
- **Activity**: Fit/Gap Analysis & Development
  - **Status**: X X X X X
- **Activity**: Unit Test
  - **Status**: X X

### Phase: Test Implement
- **Activity**: System Integration Testing, Phase 1
  - **Status**: X X X X
- **Activity**: Defect Resolution
  - **Status**: X
- **Activity**: System Integration Testing, Phase 2
  - **Status**: X X X
- **Activity**: Performance Test
  - **Status**: X X
- **Activity**: Training/ Defect Resolution
  - **Status**: X X X X
- **Activity**: Go-Live
  - **Projected Go-Live**: 7/19/2014 – 7/20/2014

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**PROPOSED**
**Project Time Line – by Environment**

**Campus Solutions/HCM Split Proposed Project Testing Cycles**

**DEV Environment**
- **Source:** CSSPRD (8.53) As of X/XX/2014
- **Apply Split Scripts, DB & Tool Upgrades**
- **CS90CNV (Stage)**
- **HR90CNV (Stage)**
- **Target:** CS90DEV (8.53) Available 2/9/2014
- **HR90DEV (8.53)**
- **Unit Testing:** (2/10 – 2/24)
- **Impact Analysis Testing:** (2/24 – 3/7)

**QNA Environment**
- **Source:** CSSPRD (8.53) As of X/XX/2014
- **Apply Split Scripts, DB & Tool Upgrades**
- **CS90CNV (Stage)**
- **HR90CNV (Stage)**
- **Target:** CS90QNA (8.53) Available 4/15/2014
- **HR90QNA (8.53)**
- **SIT 1 Testing Phase 1:** (4/27 – 5/23)
- **Performance Test:** (6/22 – 7/5)

**PPD Environment**
- **Source:** CSSPRD (8.53) As of X/XX/2014
- **Apply Split Scripts, DB & Tool Upgrades**
- **CS90CNV (Stage)**
- **HR90CNV (Stage)**
- **Target:** CS90PPD (8.53) Available 4/15/2014
- **HR90PPD (8.53)**
- **SIT 2:** (6/1 – 6/22)

**Final Production Cutover**
- **date:** 7/19-7/20
- **Source:** CSSPRD (8.53) As of 7/19/2014
- **Apply Split Scripts, DB & Tool Upgrades**
- **Target:** HR90PRD (8.53)
- **HR90CNV (Stage)**

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

<table>
<thead>
<tr>
<th>System</th>
<th>Area/Module</th>
<th>Subject Matter Experts</th>
<th>System Test (February 14')</th>
<th>Integration Test Round #1 (May 14')</th>
<th>Integration Test Round #2 (June 14')</th>
<th>Follow up needed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Total Test Scripts</td>
<td>Tests Executed</td>
<td>Total Test Scripts</td>
<td>Tests Executed</td>
</tr>
<tr>
<td>PeopleSoft</td>
<td>Admissions</td>
<td>Name 1</td>
<td>13</td>
<td>12</td>
<td>70</td>
<td>70</td>
</tr>
<tr>
<td>PeopleSoft</td>
<td>Fin Aid</td>
<td>Name 2</td>
<td>128</td>
<td>21</td>
<td>34</td>
<td>34</td>
</tr>
<tr>
<td>PeopleSoft</td>
<td>Student Life</td>
<td>Name 3</td>
<td>18</td>
<td>-</td>
<td>23</td>
<td>15</td>
</tr>
</tbody>
</table>

| TOTALS       |             |                        | 809                    | 305           | 724                    | 544           | **10              | 9          | 1114                | 819           | 16           | 3          |                                  |

| % of Completion |             |                        | 38%                    | 75%           | 74%                    |                            |                          |                          |                          |                            |                          |                          |                          |                          |
• 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

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

### By Resource

<table>
<thead>
<tr>
<th>Role</th>
<th>Hours Estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>PeopleSoft Administrator</td>
<td>1000</td>
</tr>
<tr>
<td>Database Administrator</td>
<td>800</td>
</tr>
<tr>
<td>Functional SMEs</td>
<td>1200</td>
</tr>
<tr>
<td>Security Lead</td>
<td>1200</td>
</tr>
<tr>
<td>Developers</td>
<td>1500</td>
</tr>
<tr>
<td>Communications/Training</td>
<td>600</td>
</tr>
<tr>
<td>HCM/CS Split Consultant</td>
<td>1300</td>
</tr>
<tr>
<td>Project Management (Overall)</td>
<td>1600</td>
</tr>
</tbody>
</table>
• 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:

<table>
<thead>
<tr>
<th>EAB</th>
<th>FACEs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Noel-Levitz</td>
<td>Agilon One Application Road Map</td>
</tr>
<tr>
<td>CashNet Redeployment</td>
<td>FalconInfo Phase 1 - Student Reporting</td>
</tr>
<tr>
<td>Canvas Communities</td>
<td>Grants Pre-Approval Process - SmartERP Implementation</td>
</tr>
<tr>
<td>Book Store Opt-In Changes</td>
<td></td>
</tr>
</tbody>
</table>
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

Executive Sponsors

Steering Committee

Project Management

BGSU Project Manager – TBD

Technical Project Manager – TBD

Business Project Manager – TBD

Project Management

Technical Lead – Mike Failor

Developer – TBD

Developer – TBD

Testing Lead – Rich Kasch

HR Functional Lead – Beth Ann Rife

Benefits Functional Lead – Beth Ann Rife

Payroll/Commitment Control Functional Lead – TBD

T&L Functional Lead – TBD

Graduate/Student Employment Lead – TBD

Organization Change Management – TBD

Training & Communications Lead – TBD

Subject Matter Experts / Project Stakeholders
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