PeopleSoft Full House Program Project Kick Off

CSS PeopleTools 8.54 Upgrade

February 8, 2016

Agenda

Background / Review

Where Are We?

Program Timeline and Approach

Program Delivery Model

CSS PeopleTools 8.54 Upgrade

SharePoint Project Management

The Plan for Success

Upcoming Events

Questions

The History of the PeopleSoft Application Road Map/Full House Project

Product Support End Dates

CSS 9.0	Dec-2018	
CSS/HCM 9.0	Jun-2015	**Complete**
HCM 9.0	Jun-2015	**Complete**
HCM 9.1	Sep-2017	**N/A**
FMS 9.1	Nov-2017	
Tools 8.51	Oct-2013	**Complete**
FMS Tools 8.54	Feb-2016	**In Progress**

PeopleTools 8.54 Upgrade Timeline – HCM/FMS/CSS

Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2015						2016					

HCM PeopleTools 8.54 Upgrade
7/16/2015 – 10/25/2015

FMS PeopleTools 8.54 Upgrade
10/26/2015 – 2/26/2016

CSS PeopleTools 8.54 Upgrade
2/28/2016 – 6/10/2016 (tentative)

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WHERE ARE WE?

We are HERE

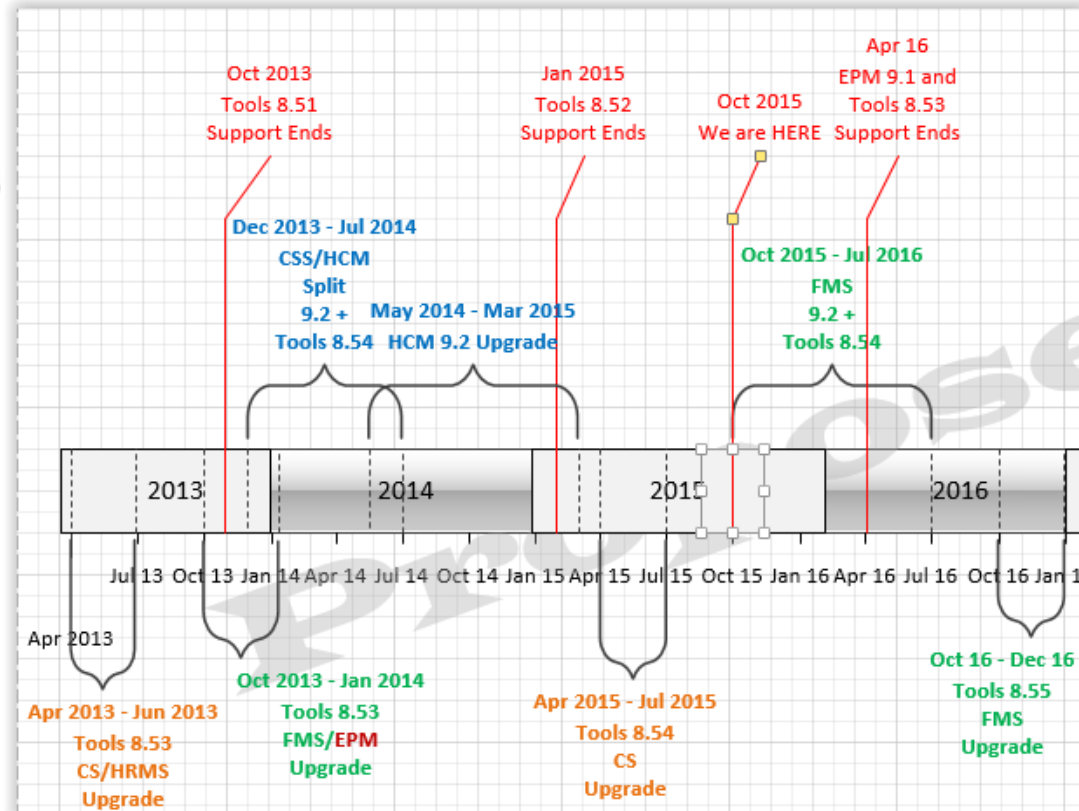The PeopleSoft Application Road – 3 year project

We have:

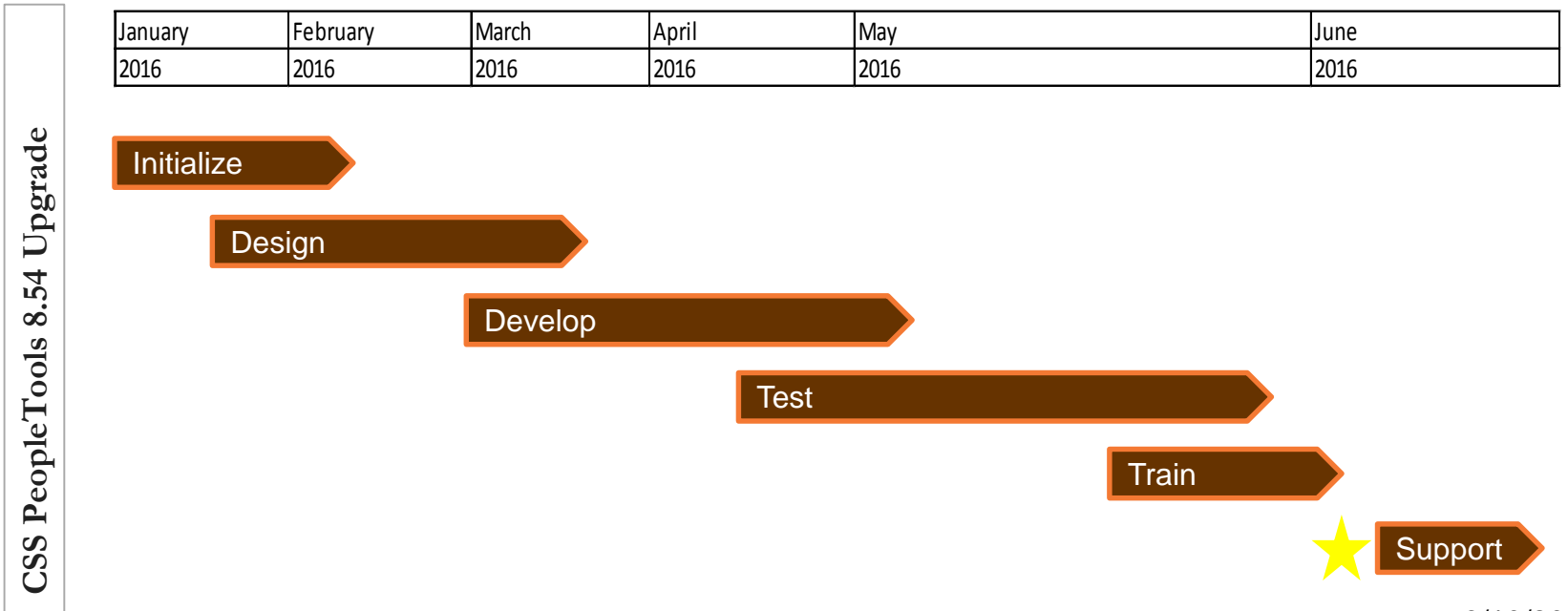- Successfully completed 2.0 years of activities

We are:

- On target
- Moving forward
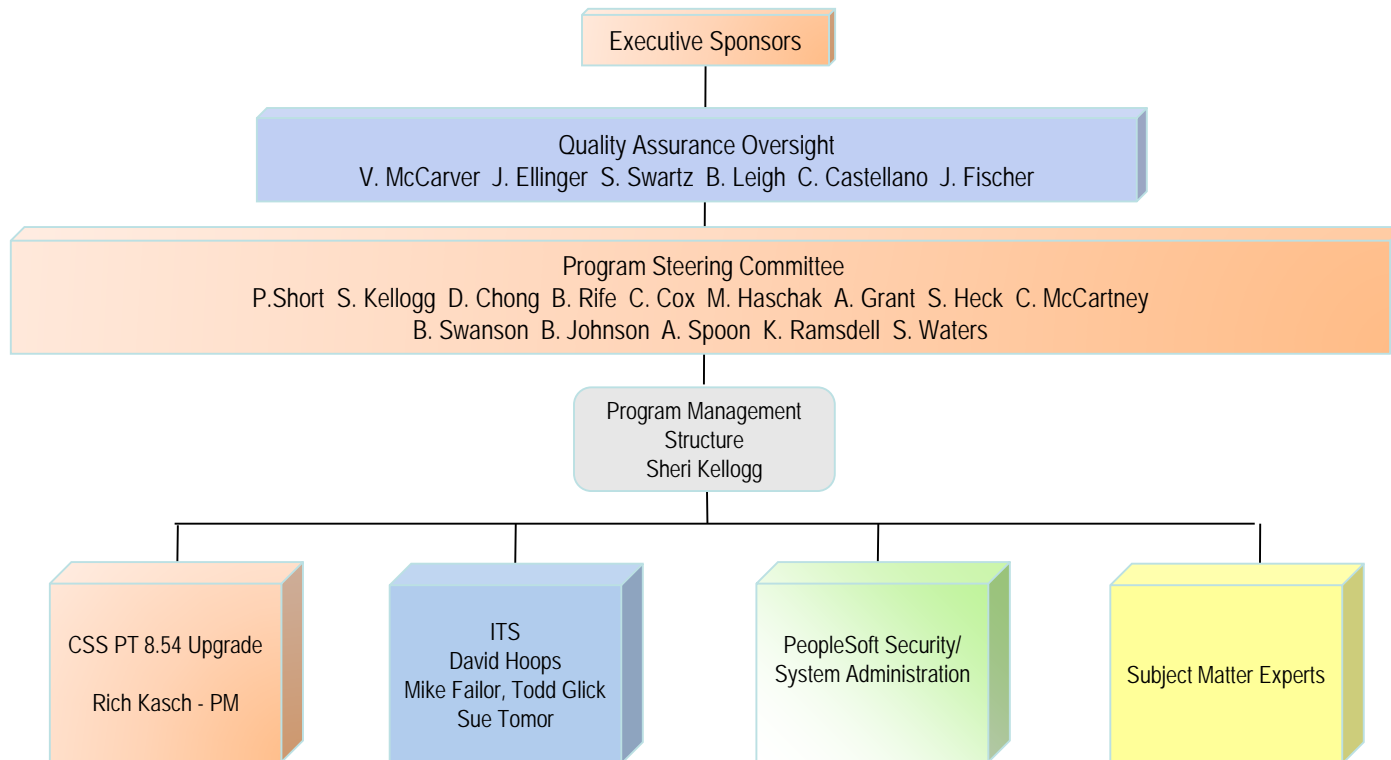
PROJECT TIMELINE
AND
APPROACH

Delivery Timeline

CSS PeopleTools 8.54 Upgrade

January 2016	February 2016	March 2016	April 2016	May 2016	June 2016

Initialize

Design

Develop

Test

Train

Support

6/10/2016

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PROJECT DELIVERY MODEL

Governance Structure

Program Governance Structure

Executive Sponsors

Quality Assurance Oversight
V. McCarver J. Ellinger S. Swartz B. Leigh C. Castellano J. Fischer

Program Steering Committee
P.Short S. Kellogg D. Chong B. Rife C. Cox M. Haschak A. Grant S. Heck C. McCartney
B. Swanson B. Johnson A. Spoon K. Ramsdell S. Waters

Program Management
Structure
Sheri Kellogg

CSS PT 8.54 Upgrade

Rich Kasch - PM

ITS
David Hoops
Mike Failor, Todd Glick
Sue Tomor

PeopleSoft Security/
System Administration

Subject Matter Experts
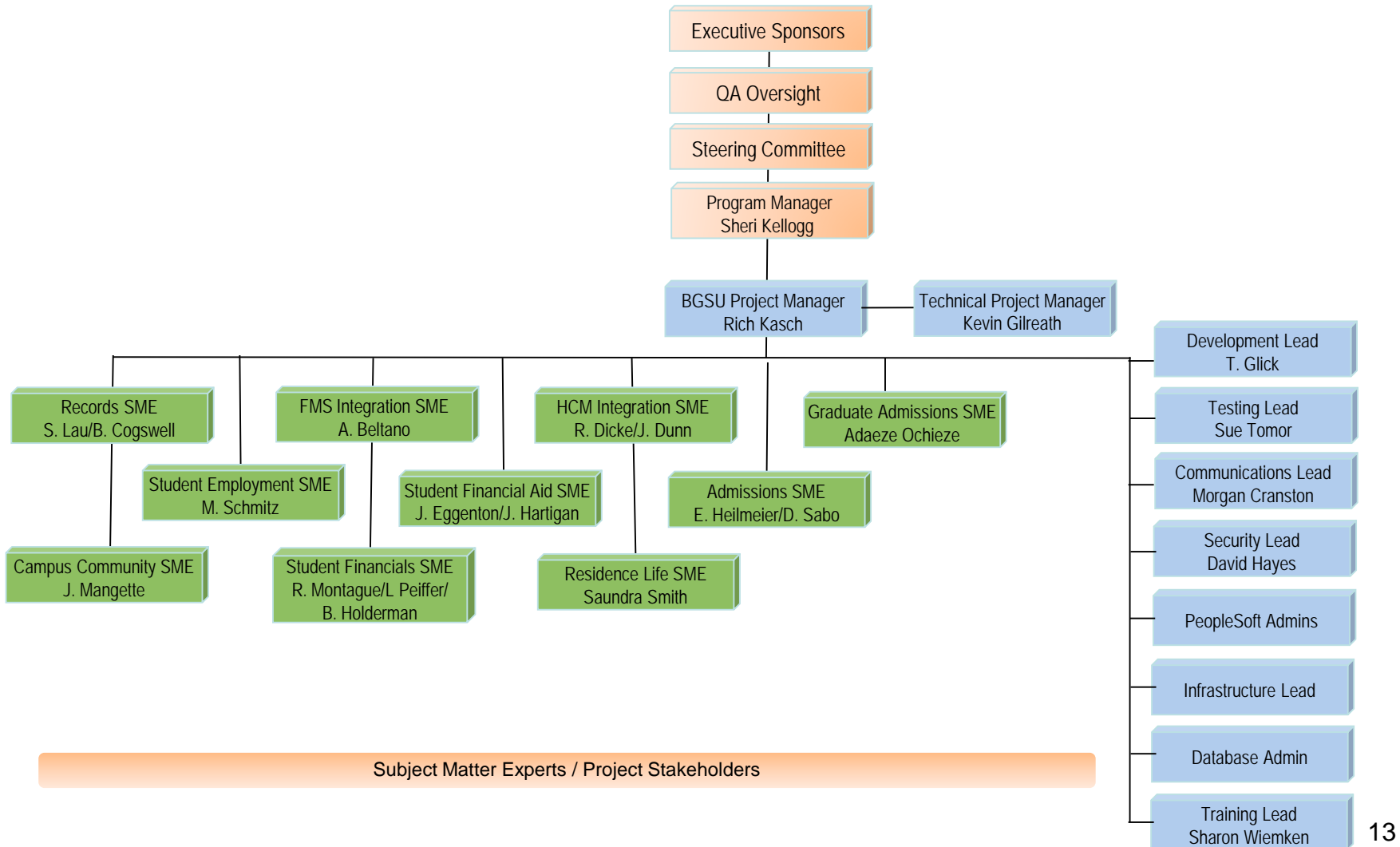
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CSS *PEOPLETOOLS 8.54 UPGRADE*

Project Highlights
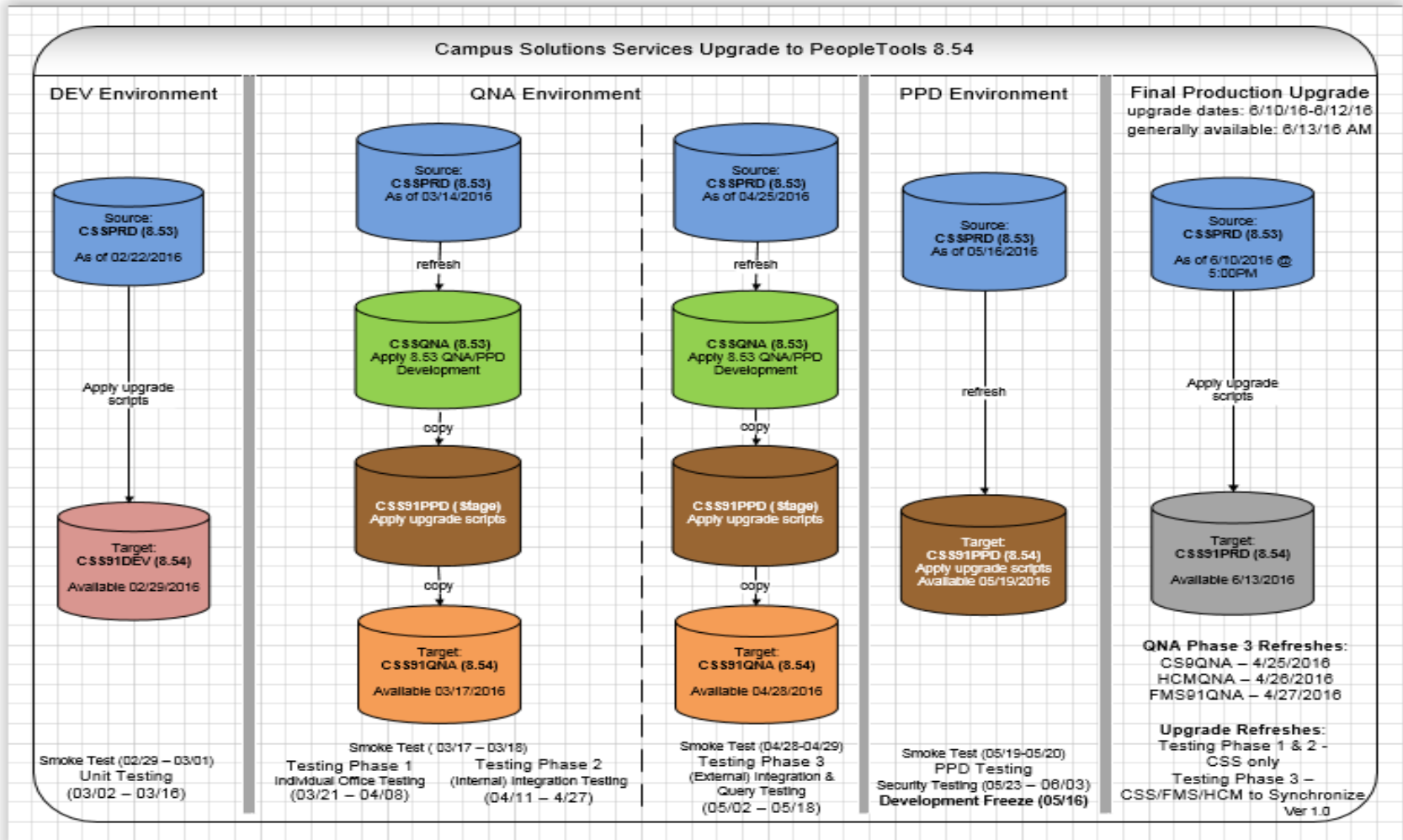
CSS PeopleTools 8.54 Upgrade— Project Highlights

Core CSS

- Perform the Traditional CSS PeopleTools 8.54 Upgrade
- No new delivered functionality will be installed or turned on
- Unless deemed necessary, Maintenance Bundle 41 will not be installed until after the CSS PeopleTools upgrade
- New CSS development with go-live dates during or shortly after the CSS PeopleTools upgrade will be evaluated on a case by case basis to determine:
  - Testing strategies
  - Implementation dates
- Install PeopleTools 8.54 branding and custom login screen

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CSS PeopleTools 8.54 Upgrade - Structure

BOWLING GREEN STATE UNIVERSITY

CSS PeopleTools 8.54 Testing Environments

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CSS PeopleTools 8.54 Project Plan

Last Updated: 2/01/2016 — Week Beginning (Monday Date):	Status	Jan-18	Jan-25	Feb-1	Feb-8	Feb-15	Feb-22	Feb-29	Mar-7	Mar-14	Mar-21	Mar-28	Apr-4	Apr-11	Apr-18	Apr-25	May-2	May-9	May-16	May-23	May-30	Jun-6	Jun-13
PeopleSoft CSS PeopleTools 8.54 Upgrade																							
Phase — Initialize					7 Weeks																		
Activity — Planning & Startup	G	X	X	X	X	X	X																
Activity — DMO Server/Environment Build	G				X	X																	
Activity — DEV Server/Environment Build	N				X	X																	
Activity — QNA Server/Environment Build	N					X	X						X	X									
Activity — PPD Server/Environment Build	N														X	X							
Phase — Customization & Development					10 Weeks																		
Activity — Compare Report Results	N				X	X	X	X	X	X	X												
Activity — Remove Outdated Objects	N				X	X	X	X	X	X	X												
Activity — Branding	N				X	X	X	X	X	X	X	X											
Activity — Rework & PS_HOME	N				X	X	X	X	X	X	X	X											
Phase — Development								6 Weeks															
Activity — Development	N					X	X	X	X	X	X												
Activity — Unit Test--DEV	N							X	X	X													
Phase — Test, Train, Implement										16 Weeks													
Activity — Test Move 1	N								X	X													
Activity — Individual Office Testing--QNA	N										X	X	X										
Activity — Module Integration Testing--QNA	N													X	X	X							
Activity — Test Move 2	N													X	X								
Activity — Synchronized Environment Integration Testing--QNA	N																X	X	X				
Activity — Test Move 3	N																X	X					
Activity — Secuirty Testing--PPD	N																			X	X		
Activity — Training	N																			X	X		
Activity — Go-Live (6/10/16 - 6/12/16)	N																					★	
Activity — Support	N																						X

Legend:
- G — On Track
- A — At Risk
- R — Off Track
- N — Not Started
- H — On Hold
- C — Completed

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CSS PeopleTools 8.54 Upgrade Project—Testing Strategy

Functional Lead Role

- Create/modify test script documents
- Test all processes within your area
- Record results on the testing spreadsheets
- Report any issues with testing to Sue Tomor

Test Scripts

- Feedback needed
- Inspect lists
- Insert new processes as needed

SharePoint Project Management

SharePoint Tool for Project Management

SharePoint Tool for Project Management

» SharePoint Training classes

- SharePoint Training is underway for University offices
- Next classes (Introductory classes):
  - March 7, 2016 @ 1:15 p.m. in Huntington 142
  - April 12, 2016 @ 1:15 p.m. in Huntington 142
  - May 18, 2016 @ 8:15 a.m. in Huntington 142
  - Register at:
    - Infopro.bgsu.edu
- Sharon Wiemken, ITS
  - swiemke@bgsu.edu
  - 2-3472

CSS PeopleTools 8.54 Upgrade Project—Testing Spreadsheets

Module/ Test #	Process Area	Test Script Description/Business Process	Expected Result
		Example Test Script Entry	
HR-001	Employee Hire	Add a new person in CSS and validate the new person is available in HCM	Person is available in CSS and HCM
HR-001	Creat New Job Opening	Create New Job Opening by Position Number	Job Opening by Position Number is created successfully
		Create New Job Opening by Job Code	Job Opening by Job Code is created successfully
HR-002	Find Applicant	Find an existing Applicant	Able to find an existing Applicant
		Apply to an open Job	Able to attach the existing Applicant to an open job
HR-003	Add an Applicant	Add a new External applicant	Sucessfully added an external applicant and attach to an open job
		Add a new Internal applicant	Sucessfully added an internal applicant and attach to an open job
HR-004	Find Job Opening	Find an Open Job	Able to find Open Jobs sucessfully
		Find a Closed Job	Able to find closed Jobs sucessfully
HR-005	Applicant to Hire Process	Internal Candidate	Applicant is sent to Manage Hire
		External Candidate	Applicant is sent to Manage Hire
HR-006	Add Personal Information	Add Personal Data	Personal Data is available in CSS and HCM
HR-006	Update Personal Information	Update address	Address is changed and Personal Data is available in CSS and HCM
HR-007		Update Primary name	Primary name is change and Personal Data is available in CSS and HCM

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CSS PeopleTools 8.54 Upgrade Project— Testing Scorecard

Testing Scorecard (as of 12/21/15) Upgrade Testing		QNA - Phase 1 Individual Office Test --Functional Leads (12/21/15 - 1/22/16)			
System	**Area/Module**	**Total Test Scripts**	**Tests Executed**	**# of Open Defects**	**% of Scripts Tested**
PeopleSoft	Accounts Payable	26	26	1	100.00%
PeopleSoft	General Ledger	13	13	0	100.00%
PeopleSoft	Purchasing	31	31	4	100.00%
PeopleSoft	Billing	130	125	2	96.15%
PeopleSoft	Accounts Receivable	29	28	1	96.55%

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THE PLAN FOR SUCCESS

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 2/1/2016

- FUND Project—BGSU Foundation
- Rewrite of SciQuest Interface
- Full House Business Automation--
  - Phase 1 and 2
- Guest Access
- Slate implementation, Grad Admissions

- In-House Student eRefunding
- Automated Scholarship Maintenance
- U.Achieve

Vacation Schedules

- Please communicate all scheduled vacations ASAP
- Coordination is key
- If you have vacation plans already scheduled and cannot be moved, please communicate that to project management as soon as possible

RULES of ENGAGEMENT

Plans for Communication

Project Meeting Structure

- Bi-weekly Program Steering Meetings
- Weekly Project Meetings Technical Team and Functional Leads
- Monthly QA Meetings (Business Area Leadership Representation)
- Monthly Dashboard status report that will be posted on the Full House web site and shared with project governance

Project Web Site – www.bgsu.edu/fullhouse

- Project Time Line
- Testing Schedule
- Risk and Issues

Team Communications

- Listservs to be created to have a consistent communication channel

UPCOMING EVENTS

Upcoming Events/Information

Technical Lead Meetings
TBD

Functional Lead Meetings
TBD

Project web site:
http://www.bgsu.edu/its/services/peoplesoft/ps-roadmap/fullhouse.html

Project email address:
FullHouse@bgsu.edu

Questions and Answers