BGSU

CSS/PeopleTools 8.54 Upgrade

Version 8.53 to Version 8.54
Scope Document

Date: 2/12/16

Scope Introduction

Summary

BGSU has invested in Oracle's PeopleSoft suite of applications as the University's ERP (enterprise resource planning) system. Applications included in our ERP suite include:

> **CSS –** Campus Solutions is a suite of software specifically designed as a higher education student administration system. We are currently operating at version 9.0 of CSS, which is Oracle's latest release of this application.

> **HCM –** Formerly called HRMS, the Human Capital Management application administers the University's Human Resources, Benefits, Payroll, and Time & Labor. We are currently operating at version 9.0 of HCM. The latest release is version 9.2.

> **FMS –** The Financial Management System (FMS) includes areas such as the general ledger and commitment control, purchasing, accounts payable, accounts receivable and billing, grants and projects, and asset management. We are currently at version 9.1 with the latest vendor release being 9.2.

Oracle has provided end of support dates for Extended Support for the PeopleSoft suite of applications as shown in the below table. In answer to these end of support dates, BGSU leadership has developed a PeopleSoft Application Road Map for the CSS, HCM, and FMS applications that ensures the University remains supported under Oracle through 2018.

Release	Extended Support Ends
CSS 9.0	December 2018
CSS / HCM 9.0	June 2015
HCM 9.0	June 2015
HCM 9.1	September 2017
FMS 9.1	November 2017

PeopleSoft Road Map

The PeopleSoft Road Map consists of three phases. Each of these phases will be considered a separate project; however there are interdependencies between the projects.

Phase 1 – CSS / HCM Split
To address the June 2015 end of support date for HCM, BGSU must upgrade the HCM application. In order to perform this upgrade, a split of the CSS/HCM environment and database was required since the CSS and HCM applications shared the same Oracle

11.2.0.3 database. The split was required to take place first because Oracle does not support moving to HCM 9.1 or 9.2 while the database is being shared. This project included moving the environments from a shared set of physical servers to separate Virtual Machines (VM's). This phase of the Road Map took place from January 2014 – July 2014, with a go-live date of July 19, 2014.

Phase 2 – HCM Upgrade
Once the CSS/HCM databases were split into separate databases, BGSU was able to begin the project to immediately upgrade HCM from 9.0 to 9.2. This phase of the Road Map took place from August, 2014 – July, 2015, with a Go-Live date of May 22, 2015.

Phase 3 -   FMS Upgrade
FMS will be upgraded as the final phase of the PeopleSoft Road Map. It is our goal to complete the upgrade to FMS 9.2 by December 2015. However, before the upgrade can take place, FMS PeopleTools must be upgraded to PT 8.54. This phase is expected to run from October, 2015 – February, 2016 with a Go-Live date of February 26 - 28, 2016. In addition, PeopleTools 8.53 will be desupported in July 2016.

In order to remain supported by Oracle, our PeopleSoft applications must be upgraded to the latest PeopleTools version. FMS and CSS PeopleTools must be upgraded to PT 8.54. The FMS phase is expected to run from October, 2015 – February, 2016 with a Go-Live date of February 26 - 28, 2016. The CSS phase is expected to run from January, 2016 – to June, 2016 with a Go-Live date of June 10, 2016.

PeopleSoft Application Road Map/Full House Timeline

The chart found below illustrates the proposed PeopleSoft Application Road Map timeline.

Peoplesoft Upgrade Timeline
For CSS/FMS/HRMS
Bring to current level
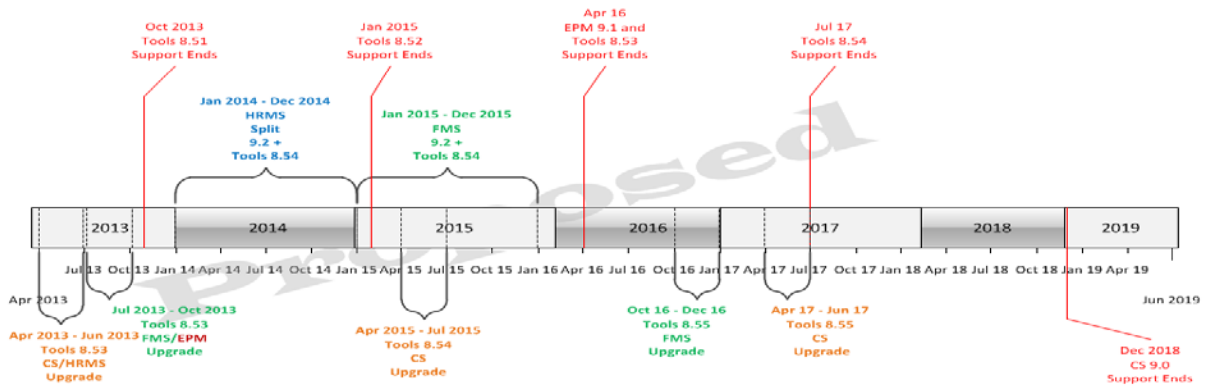
CSS PeopleTools 8.54 Upgrade

This scope document will focus on the Phase 3 activities associated with the CSS PeopleTools Upgrade from 8.53 to 8.54. The current CSS footprint at BGSU includes the following modules:

- Undergraduate and Graduate Admissions
- Student Records
- Student Financials
- Student Financial Aid
- Campus Community
- Residence Life
- Touchpoints to the Controller's Office
- Touchpoints to Business Operations
- Touchpoints to Time and Labor
- Touchpoints to Human Resources

While some customizations have been added to the environment, core processes are used as delivered by PeopleSoft. It will be critical, however, to include all interfaces to CSS as part of the testing package for this upgrade.
Bundle and regulatory applications will be applied as needed; these will include, but are not limited to:
- 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

Scope Planning

Initial planning for the PeopleTools Upgrades began with the creation of a project charter/scoping document in September, 2015. As a result of this scoping session, the team identified the need for upgrading CSS PeopleTools to the current version without applying any previous versions of maintenance packages.

The planning team and subject matter experts for this PeopleTools upgrade include:

Name	Department
Sue Lau	Registrar
Becky Cogswell	Registrar
Jason Dunn	Human Resources
Rhonda Dicke	Time and Labor / Payroll
Amy Beltano	Controller's Office
Michelle Schmitz	Student Employment
John Eggenton	Student Financial Aid
Justin Hartigan	Student Financial Aid
Adaeze Ochieze	Graduate Admissions
Erin Heilmeier	Undergraduate Admissions
Dustin Sabo	Undergraduate Admissions
Teresa Coss	Business Operations
Jeff Mangette	Registrar
Rhonda Montague	Bursar's Office
Leann Peiffer	Bursar's Office
Brenda Holderman	Bursar's Office
Saundra Smith	Residence Life
Sue Tomor	ITS
Casey Meyer	ITS
David Hayes	ITS
Mike Failor	ITS
Todd Glick	ITS
Carol Christman	ITS
Meg Shiple	ITS
Susan Shammo	ITS
Rick Williamson	ITS
Mark Heider	ITS

Nick Savich	ITS
David Hoops	ITS
David Weimer	ITS
Sheri Kellogg	ITS
Phyllis Short	ITS
Rich Kasch	ITS

Project Assumptions

The following assumptions were made while developing the scope:

1. Functional leads will need to be assigned for each functional area impacted by the CSS PeopleTools upgrade.
2. Functional areas will be required to actively participate in the testing phases of this project. This means that resources will need to be available to ensure thorough testing in each area.
3. Business processes changes may need to occur in order to obtain the benefits of some business transformation.

Project Deliverables

1. CSS PeopleTools application upgrade from version 8.53 to version 8.54.
2. Security changes, as needed, to support the new environment.
3. Infrastructure upgrade/build to support the 8.54 upgrade.
4. Applications as noted above in the Scope section
5. Documented core business process testing plans.
6. Business process transformation, as needed.
7. Communications plan for relaying project information to Executive Sponsors, Steering Committee members, Functional Areas, and the entire campus as needed.

Proposed Project Timeline

The CSS PeopleTools Upgrade to 8.54 will take approximately 5 months depending upon the scope and number of resources available to the project. There is an Oracle end of support date of June 2016 that must be taken into consideration when planning the project schedule.

The proposed project timeline for the FMS PeopleTools Upgrade is to go live in June, 2016.
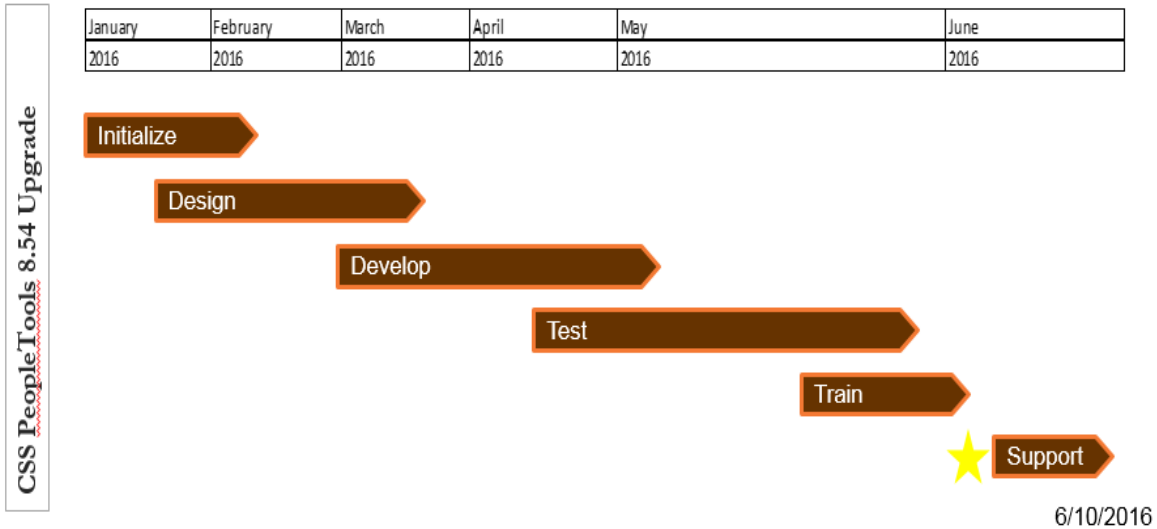
Project Planning

The expected project schedule is illustrated below.

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 — Security 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

Specific Exclusion from Scope

This project focuses on the PeopleSoft CSS application only. It does not include upgrades to the FMS or HCM applications. In addition, there will be no maintenance packages applied to CSS during the PeopleTools 8.54 Upgrade project; these will be applied during the CSS 9.2 Upgrade project.

However, the following guidelines need to be considered during the planning and implementation of CSS PeopleTools 8.54:

- 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

Project Governance Structure

A Steering Committee will provide oversight and direction for this project. The team will include the following:

| Name	Department
Sharon Swartz	Controller, Office of the Controller
Viva McCarver	Chief Human Resources Officer, Human Resources
Brad Leigh	Executive Director, Business Operations
Cecilia Castellano	Vice Provost, Strategic Enrollment Planning
John Fischer	Vice Provost, Academic Affairs
Beth Ann Rife	HRIS Manager, Human Resources
Dawn Chong	Director, Student Employment Services
Chris Cox	University Registrar, Registrar's Office
Matt Haschak	Director, IT Security & Infrastructure

Sandy Heck	Associate Directory, HR and Benefits
Chasity McCartney	Bursar, Bursar's Office
Bob Swanson	Associate Controller, Controller's Office
Adrea Spoon	Director of Admissions, Admissions Office
Andy Grant	Director, Business Operations
Betsy Johnson	Director, Student Financial Aid
Keith Ramsdell	Director of Graduate Enrollment, Graduate College
Sarah Waters	Director of Residence Life, Office of Residence Life
Phyllis Short	ITS
Sheri Kellogg	ITS

As part of this project, BGSU has retained the consulting services of Navigation consultants to help us execute our PeopleSoft Application Road Map. We are looking to Navigation consultants to deliver key technical expertise relating to the CSS PeopleTools Upgrade as well as technical Project Management, and functional consulting services.

The goal of this project is to establish joint leadership of the project between ITS and the University's Business offices through the involvement of a Business Project Manager. The Business Project Manager will participate in regular project status meetings and help make business decisions, discuss issues, and provide feedback on the project.

The resources involved in this project will include a dedicated project team that is augmented with several part-time roles. Substantial functional unit and business process testing will be required by the core business areas in order to ensure overall project success. The functional leads will be identified early in the project.

The overall Project Governance Structure is:
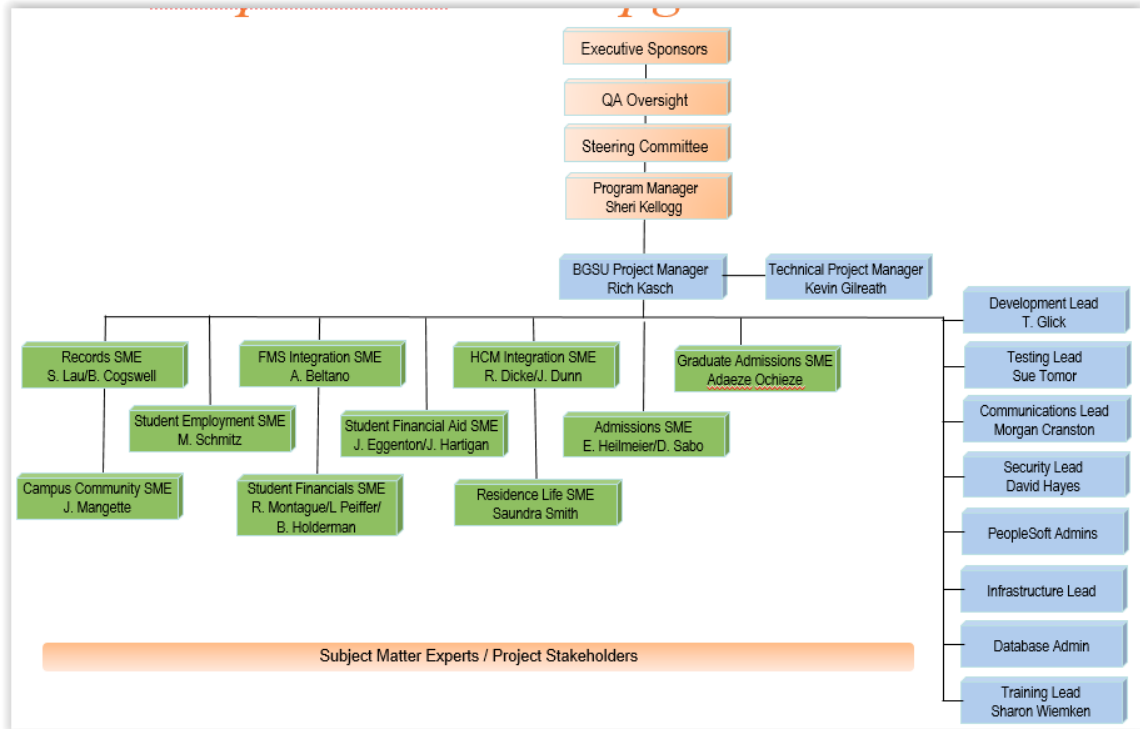
Project Issues/Concerns/Risks

The following issues, concerns and risks have been identified for the CSS version 8.53 to version 8.54 PeopleTools Upgrade project.

1. This project has University-wide impact and any issues could affect numerous functional areas and business processes.

2. Sufficient business area resources will need to be allocated to work on this project and conduct functional area testing within the project timeframe.

3. The University community must be well informed about the project and any business process changes that could result from the upgrade.

4. Training may need to be conducted for any business process changes.

5. There may be a need to apply patches/fixes to production and project environments during the project.

6. Security could be impacted and will need to be addressed as part of the upgrade.

Other Business Areas Affected

This project will affect all Colleges, Departments, Faculty, Staff, Students, and any other related entities that use the University's PeopleSoft's CSS application for Student services.

Project Resource Requirements

Module	Role	Resource	Commitment
Project Management			
	Project Director	Sheri Kellogg	
	Project Manager	Rich Kasch	
	Business Project Manager	Adrea Spoon	
	Business Project Manager	Betsy Johnson	
	Business Project Manager	Chris Cox	
	Business Project Manager	Keith Ramsdell	
	Business Project Manager	Beth Ann Rife	
	Business Project Manager	Sandy Heck	
	Business Project Manager	Dawn Chong	
	Business Project Manager	Chasity McCartney	
	Business Project Manager	Sarah Waters	
Core Human Resources			
	Functional Lead	Beth Ann Rife, Jason Dunn	
	ITS Lead	Mike Failor	
Time and Labor			
	Functional Lead	Rhonda Dicke	
	ITS Lead	Mike Failor	
Payroll			
	Functional Lead	Rhonda Dicke	
	ITS Lead	Mike Failor	
Student Employment			
	Functional Lead	Michelle Schmitz	

	ITS Lead	Mike Failor	
Controller's Office			
	Functional Lead	Amy Beltano	
	ITS Lead	David Hoops	
Admissions			
	Functional Lead	Erin Heilmeier, Dustin Sabo	
	ITS Lead	Rich Kasch	
Graduate Admissions			
	Functional Lead	Adaeze Ochieze	
	ITS Lead	Rich Kasch	
Student Financials			
	Functional Lead	Rhonda Montague, Leann Peiffer, Brenda Holderman	
	ITS Lead	Sue Tomor	

Student Financial Aid			
	Functional Lead	John Eggenton, Justin Hartigan	
	ITS Lead	Sue Tomor	
Student Records			
	Functional Lead	Sue Lau, Becky Cogswell, Jeff Mangette	
	ITS Lead	Sue Tomor	
Residence Life			
	Functional Lead	Saundra Smith	
	ITS Lead	Mike Hachtel	
IT Technical and Development Resources			
	Infrastructure Admin	Casey Meyer	
	Database Admin	Norm Carney	
	PS Admin	Rick Williamson	
	PS Admin	Mark Heider	
	PS Admin	Nick Savich	
	Security Administrator	David Hayes	
	Development Lead	Todd Glick	
	Application Lead	Mike Failor, David Hoops	
	Application Developer	Carol Christman, Susan Shammo, Meg Shiple, Greg Deitering, David Weimer	
	Training Lead	Sharon Wiemken	
	Testing Lead	Sue Tomor	
	Communications Lead	Morgan Cranston	
	Technical Project Manager	Kevin Gilreath	

Project Approval

The following individuals represent the sponsors authorizing this project.

Name	Department
Sharon Swartz	Controller, Office of the Controller
Viva McCarver	Chief Human Resources Officer, Human Resources
Brad Leigh	Executive Director, Business Operations
Cecilia Castellano	Vice Provost, Strategic Enrollment Planning
John Fischer	Vice Provost, Academic Affairs
Beth Ann Rife	HRIS Manager, Human Resources
Dawn Chong	Director, Student Employment Services
Chris Cox	University Registrar, Registrar's Office
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Sandy Heck	Associate Directory, HR and Benefits
Chasity McCartney	Bursar, Bursar's Office
Bob Swanson	Associate Controller, Controller's Office
Adrea Spoon	Director of Admissions, Admissions Office
Andy Grant	Director, Business Operations
Betsy Johnson	Director, Student Financial Aid

| Keith Ramsdell | Director of Graduate Enrollment, Graduate College |
| Sarah Waters | Director of Residence Life, Office of Residence Life |

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