PEOPLESOFT FULL HOUSE PROGRAM PROJECT KICK OFF

FMS PeopleTools 8.54 Upgrade

November 17, 2015

Agenda

Background / Review

Where Are We?

Program Timeline and Approach

Program Delivery Model

FMS PeopleTools 8.54 Upgrade

SharePoint Project Management

The Plan for Success

Upcoming Events

Questions

Product Support End Dates

Release	Extended Support Ends	Status
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

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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

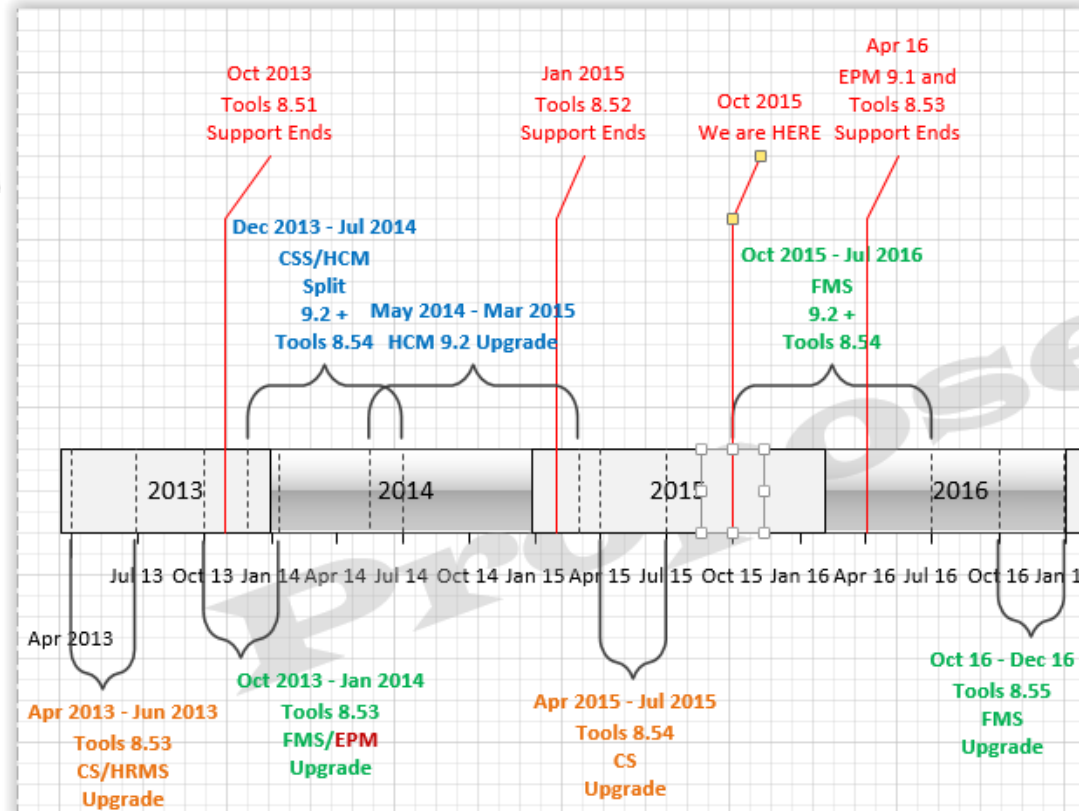The PeopleSoft Application Road – 3 year project

We have:
- Successfully completed 2.0 years of activities
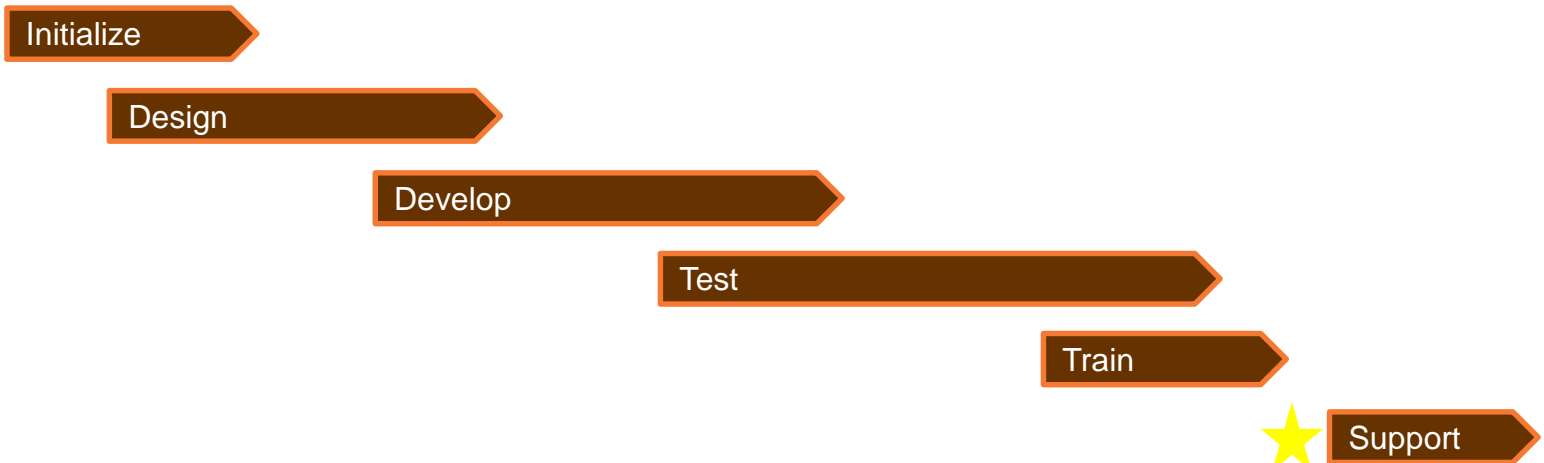
We are:
- On target
- Moving forward

PROJECT TIMELINE
AND
APPROACH

Delivery Timeline

	October	November	December	January	February
	2015	2015	2015	2016	2016

FMS PeopleTools 8.54 Upgrade

Initialize

Design

Develop

Test

Train

Support

02/26/2016

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PROJECT DELIVERY MODEL

Governance Structure

Project Governance Structure

Executive Sponsors

Project Stakeholder
S. Swartz

Project Team Members
B. Rife, V. McCarter, B. Leigh, A. Grant, M. Schoenfeld, H. Collingwood, J. Slough, D. Teeple, J. Lewandowski, T. Kornacki

Project Manager
Sheri Kellogg

Project Manager

Rich Kasch

ITS
David Hoops
Mike Failor, Todd Glick
Sue Tomor
Greg Deitering

PeopleSoft Security

David Hayes

Subject Matter Experts
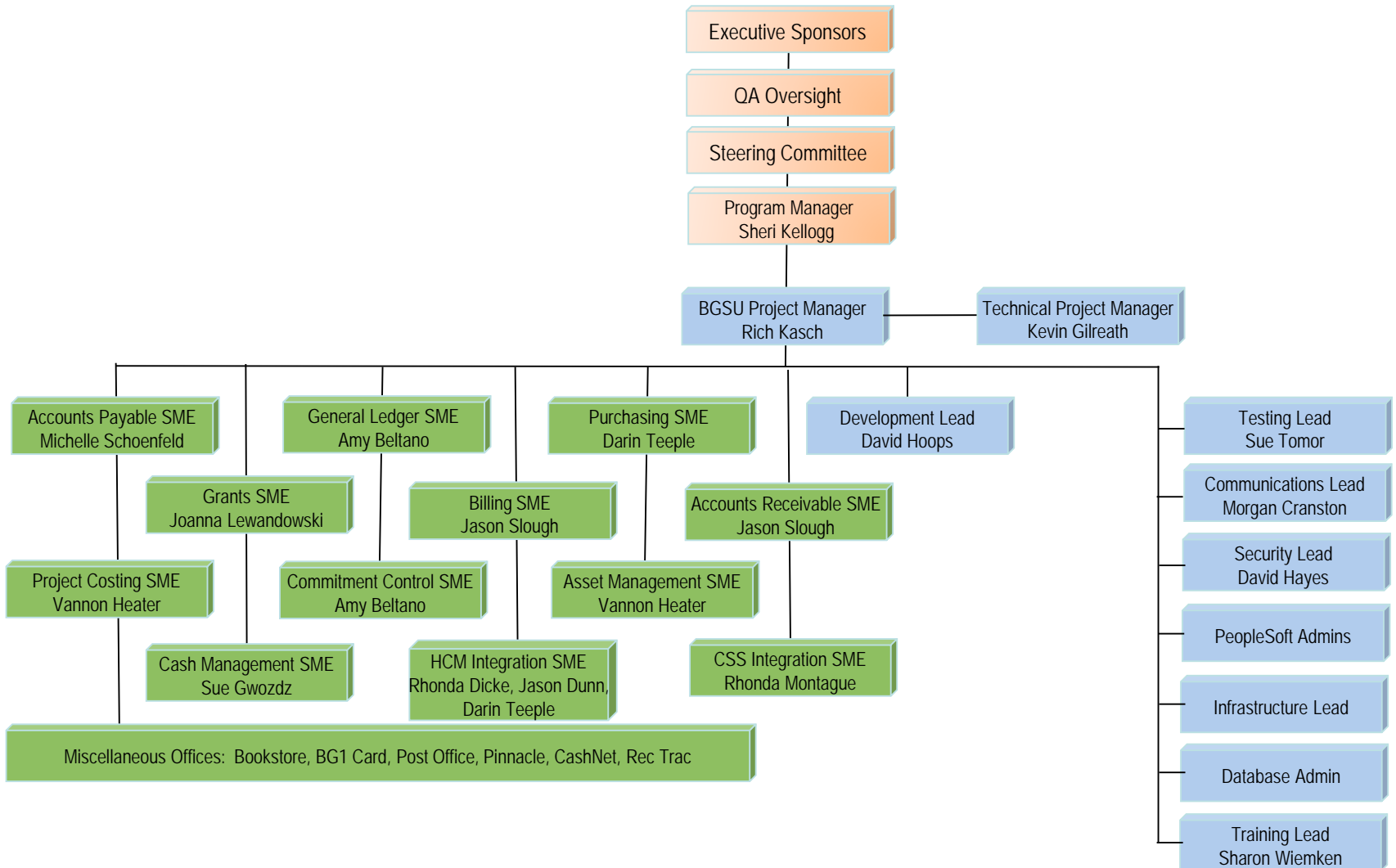
A. Beltano

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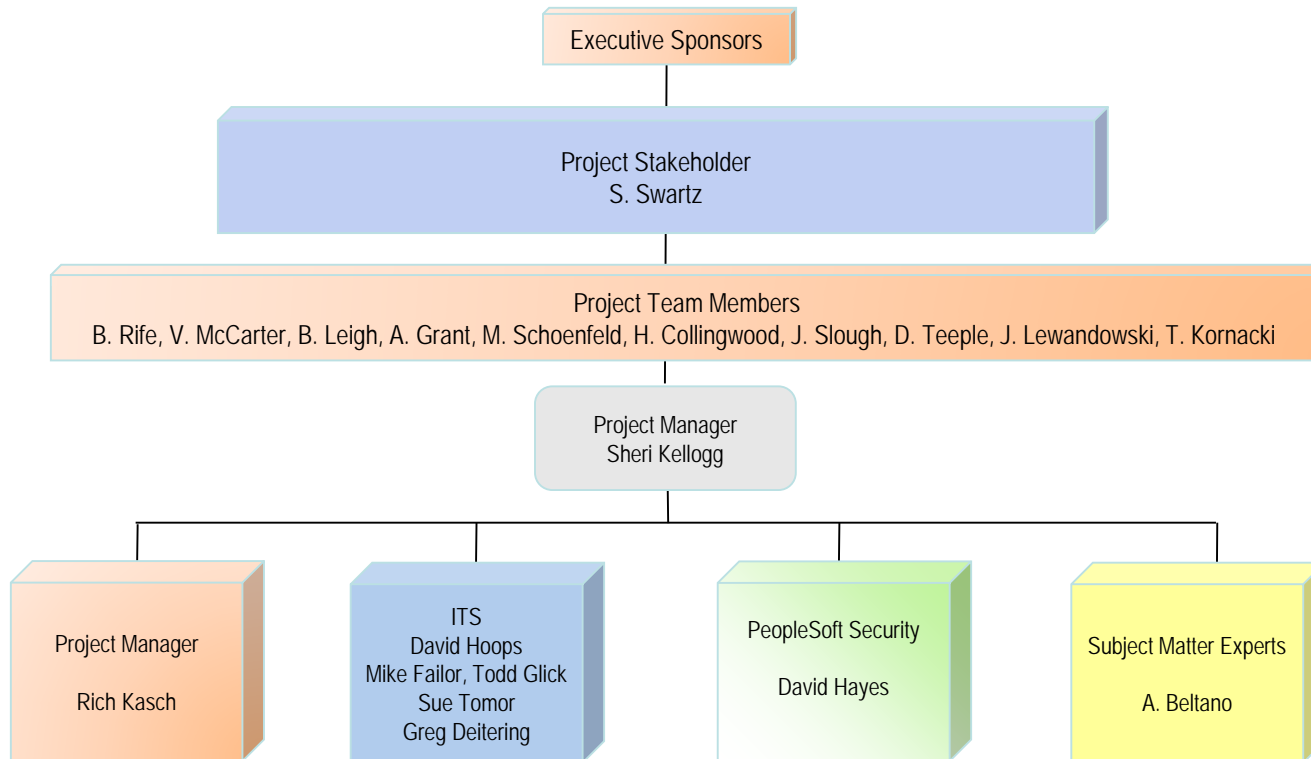
FMS PEOPLETOOLS 8.54 UPGRADE

Project Highlights

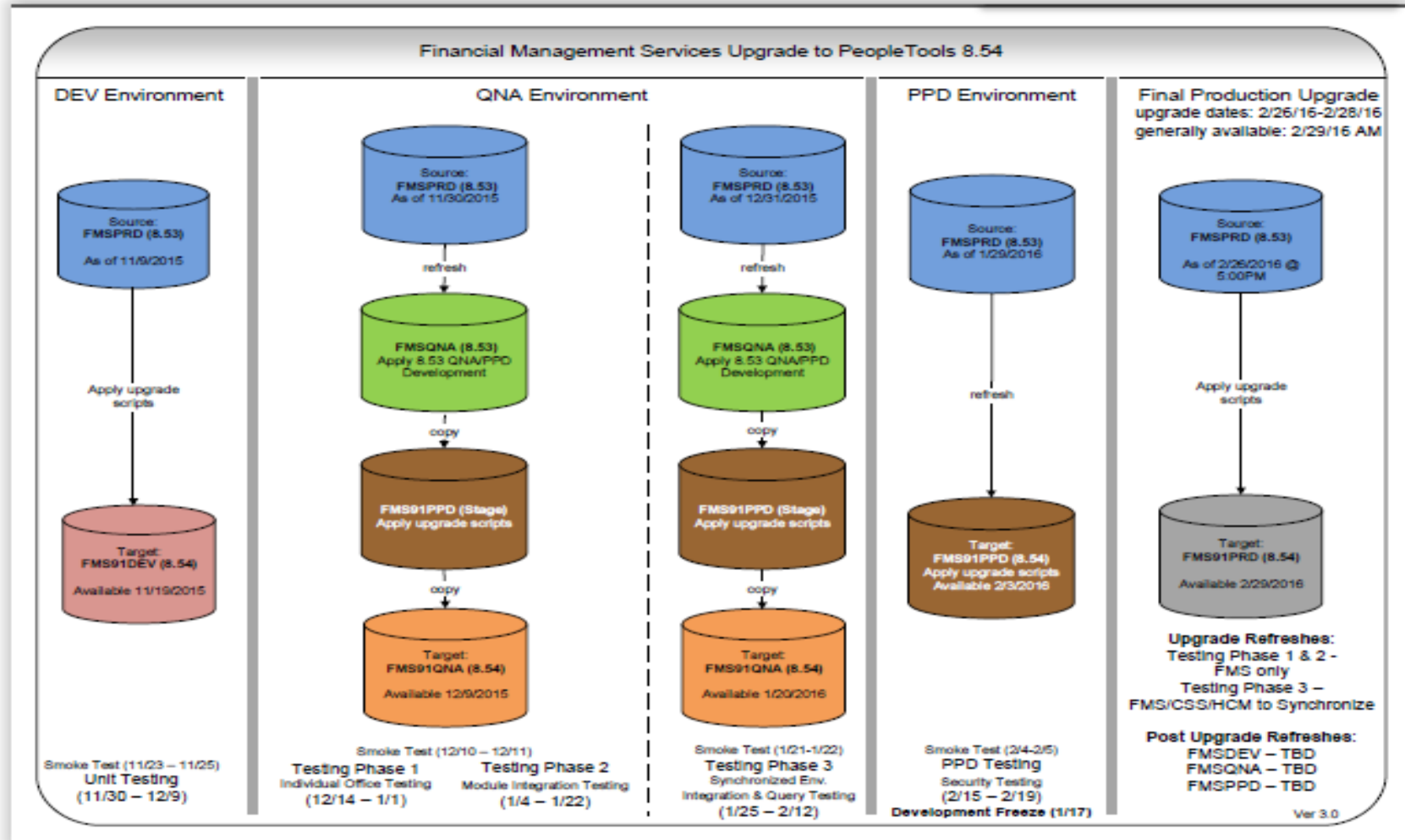# *FMS PeopleTools 8.54 Upgrade Project Highlights*

Core FMS

- Perform the Traditional FMS PeopleTools 8.54 Upgrade.

- No maintenance packs will be updated.

- Maintenance brought to the current level will be done during the FMS 9.2 upgrade.

- Implement the SmartERP project .

- Implement the latest SciQuest interface

- Install PeopleTools 8.54 branding.

- Include the latest 1099 module

FMS PeopleTools 8.54 Upgrade - Structure

Executive Sponsors

QA Oversight

Steering Committee

Program Manager
Sheri Kellogg

BGSU Project Manager
Rich Kasch

Technical Project Manager
Kevin Gilreath

Accounts Payable SME
Michelle Schoenfeld

General Ledger SME
Amy Beltano

Purchasing SME
Darin Teeple

Development Lead
David Hoops

Testing Lead
Sue Tomor

Grants SME
Joanna Lewandowski

Billing SME
Jason Slough

Accounts Receivable SME
Jason Slough

Communications Lead
Morgan Cranston

Project Costing SME
Vannon Heater

Commitment Control SME
Amy Beltano

Asset Management SME
Vannon Heater

Security Lead
David Hayes

PeopleSoft Admins

Cash Management SME
Sue Gwozdz

HCM Integration SME
Rhonda Dicke, Jason Dunn,
Darin Teeple

CSS Integration SME
Rhonda Montague

Infrastructure Lead

Database Admin

Miscellaneous Offices: Bookstore, BG1 Card, Post Office, Pinnacle, CashNet, Rec Trac

Training Lead
Sharon Wiemken

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Subject Matter Experts / Project Stakeholders

FMS PeopleTools 8.54 Environments

FMS 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 Demo

- Scheduled for the Functional Lead meeting
  - Thursday, November 19, 1:00 p.m., Huntington 105
- Sharon Wiemken, ITS

SharePoint Tool for Project Management

FMS PeopleTools 8.54 Upgrade Project— Testing Spreadsheets

	FMS 9.2 Test Scenarios								
		Round #3--PPD Integrated Testing							
Step	Task	Interface/ Business Process	Subject Matter/Proce ss Expert	ITS Resource Responsible for Testing	Job/ Process Name(s)	Scheduled Date of FMSQNA Test	FMSQNA Test Successful?	Date of Successful FMSQNA Test	JIRA Issue Number	JIRA Issue Description
rchasing									
1	Change Vendor for SUA - jbuhrow@bgsu.edu - Sherwin Williams , American Interiors	N	Darin Teeple	John Konecny		12/4/2013	Yes	12/4/2013		
2	Change Vendor for ACH - jbuhrow@bgsu.edu - Sharon Swartz, CDW	N	Darin Teeple	John Konecny		12/4/2013	Yes	12/4/2013		
3	Change Vendors for print dispatch - purchasing - Sherwin Williams	N	Darin Teeple	John Konecny		12/4/2013	Yes	12/4/2013		
4	Change vendor for email dispatch - dteeple@bgsu.edu - American Interiors	N	Darin Teeple	John Konecny		12/4/2013	Yes	12/4/2013		
5	Change vendor for fax dispatch 419/372-8416 - Workspace Concepts	N	Darin Teeple	John Konecny		12/4/2013	Yes	12/4/2013		
6	Catalog order using Dept Chartfields - print dispatched	N	Darin Teeple	John Konecny		12/4/2013	Yes	12/5/2013		

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FMS 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 11/17/2015

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

- Grants Pre-Approval Process – Smart ERP Implementation
- EAB Campus
- 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

Wednesdays, beginning November 19, 2015
1:00 p.m.
105 Huntington Building

Functional Lead Meetings

Thursdays, beginning November 18, 2015
11:00 a.m.
105 Huntington Building

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

Project email address:
FullHouse@bgsu.edu

Questions and Answers