CSS Access BGSU Project

Implementation for Demographic and
Financial Data Permissions

Scope Document

August 13, 2014
Revised June 19, 2015

Scope Introduction

<u>Summary</u>

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 functionality for Access BGSU (referred to as Delegated Access by PeopleSoft) over the course of two software bundles:

Date	Bundle
October, 2012	Bundle 27
April, 2013	Bundle 29

BGSU has previously researched implementing the Access BGSU process by creating a customized "bolt-on" process. However, the delivered functionality now available in the base CSS module has been implemented by a number of other institutions and has been deemed an acceptable solution to provide Access BGSU.

At this point, it would be appropriate to define some of the terms that are used throughout the description of the Access BGSU process; the terms and definition are summarized in the following graphic:

Access BGSU Common Terms and Definitions

Definition

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**

Access BGSU Road Map

The Access BGSU Road Map consists of one, coordinated phase for setup, configuration, test, communication and implementation of transactions deemed appropriate by the Access BGSU Functional Lead committee and approved by the Executive Sponsors. The transactions eligible for this implementation are listed below.

Roadmap – Setup, Configuration, Test, Communication, Implementation of Delivered Transactions

To take advantage of the HABIT Program's goal of delivering campus-wide services for students and increasing efficiencies, the Access BGSU Workstream must be implemented in a coordinate approach to have the transactions available as soon as possible while ensuring the existing CashNet account holders and incoming Freshmen through the SOAR process have the necessary communications to enroll in this new process. The transactions implemented represent a cross-section of demographic and financial data most desired by the BGSU Administrative Offices and the proxies who have been granted access. This phase of Access BGSU is expected to begin in February, 2015, having a scheduled Go-Live date of March, 2016. This project is currently underway and on schedule.

PeopleSoft Application Road Map Timeline—HABIT Program/Access BGSU Workstream

Access BGSU

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

Design / Develop / Test / Communicate / Deploy

3/1/2016

Roadmap -- **Setup, Configuration, Test, Implementation of *Delivered* Processes**

This scope document will focus on the project activities associated with the Access BGSU implementation. The delivered transactions for Access BGSU includes the following modules:

- Emergency Contact
- Contact Information
- To Do List
- Holds

Even though these transactions are delivered with the Access BGSU functionality, the Executive Sponsors will be asked to approve any changes to this list before any setup, configuration and customization takes place.

The transactions that will require custom configuration (not development) includes the following:

- Student Grades
- Student Financial Aid Awards
- CashNet

An important fact to remember is any existing link on the Student Center page can be configured to be a Access BGSU transaction. These, and any new transactions must be approved by Executive Sponsors. CashNet requires coordination with the vendor to transfer the link for bill view/pay from the current portal to the Access BGSU module.

<u>**Scope Planning**</u>

Initial planning for the Access BGSU Project began with the conception of the HABIT program. Planning continued with major stakeholders holding an initial discussion in June, 2014. As a result of these discussions, the team identified a number of scope directions, subject to the approval of the Executive sponsors.

The planning team and subject matter experts for these discussions included:

Name	Department
Chasity McCartney	Bursar
Rhonda Montague	Bursar
Leann Peiffer	Bursar
Jerry Ameling	Student Financial Aid
Tina Coulter	Student Financial Aid
Chris Cox	Registration and Records
Jeff Mangette	Registration and Records
Sheri Kellogg	ITS
Margo Kammeyer	ITS
Todd Glick	ITS

<u>**Planning Team Findings**</u>

Project Alternatives

The following alternatives were identified during scope planning for the Access BGSU project:

A. Delivered Transactions as soon as possible

The following points were identified during the discussion:

1. This plan delivers automation, control and efficiencies to the student and their proxy in a short timeframe
2. There are specific areas that will benefit from these delivered transactions:
    a. Campus Community
    b. Bursar
3. There are specific areas that will not benefit from this plan:
    a. Student Financial Aid
    b. Records and Registration

4. Current CashNet users—both students and their parents—must receive communications to transition them to the Access BGSU method of granting access

Benefits:

1. Deliver a PeopleSoft-supported solution as quickly as possible.
2. Ease of configuration for the delivered transactions

Disadvantages:

1. Multiple points of communication to existing CashNet account holders and incoming Freshmen to explain how to delegate access to the student's proxy
2. The disruption of existing business processes for a number of BGSU administrative offices is possible with this timeline spanning important academic year milestones.

B. Mix Delivered and Custom Transactions

The following points were identified during the discussion:

1. This plan delivers automation, control and efficiencies to the student and their proxy in an extended timeframe
2. All areas would benefit from this solution
3. Custom transactions—*as long as they use an existing Student Center page as a basis*—can be defined in a relatively straightforward manner with a reasonable amount of custom development.
4. CashNet users must be communicated to, defining a coordinated program of specific releasing information at each point of implementation

Benefits:

1. Deliver a PeopleSoft-supported solution for the system users that is fully deployed.
2. Communication will be coordinated for a one-time rollout where CashNet account holders will be educated on how to access the student's financial information

Disadvantages:

1. An extended project timeline raises the possibility of delays, missed deadlines and miscommunication to the system's users.

Project Assumptions

The following assumptions were made while developing the scope:

1. The alternative to implement a mixture of delivered and customized transactions was chosen by the Committee and has been supported by the Executive Sponsors

2. Functional leads will be assigned from each functional area impacted by the Access BGSU project.

3. 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.

4. Pilot groups will be formed to ensure the functionality of the Access BGSU system is easy to use and understand

5. Functional areas must take ownership of this process, especially with the following points:
   a. definition of the BGSU version of the electronic Terms and Conditions/ FERPA agreement
   b. standardized communication to the student and their proxy
   c. configuring the transactions to prevent any data from being changed by the student's proxy
   d. defined access to the PeopleSoft Access BGSU management screens and assigning responsibility to BGSU Administrative Offices' resources to use them to assist students and their proxies.

Project Deliverables

1. PeopleSoft supported Access BGSU implementation
2. Security changes to support the new process.
3. Access BGSU web site.
4. Communication to all users about the process functionality and how that will coordinate with existing CashNet account holders.
5. Creation of processes to educate incoming Freshmen and their parents about Access BGSU during the SOAR experience
6. Communication plan for relaying project information to Executive Sponsors, Steering Committee members, Functional Areas, and the entire campus as needed.
7. Training for the BGSU Administrative Office resources
8. Social media opportunities for student to become engaged with the Access BGSU process.
9. Pilot Group testing utilizing such groups as Student Government membership, students and parents enrolled for tuition fee waivers, representative members of each class and Administrative Office resources assigned to the project.

10. Web page(s) representing the destination of the proxy authentication process and any on-line help for navigating the Guess Access pages.

Proposed Project Timeline

The Access BGSU project will take approximately 9 months (or sooner) depending upon the project scope, ease of transaction customization and the number of resources available to the project. The project will begin in February, 2015 and is projected to be implemented in March, 2016.

The proposed project timeline for the Access BGSU project is:
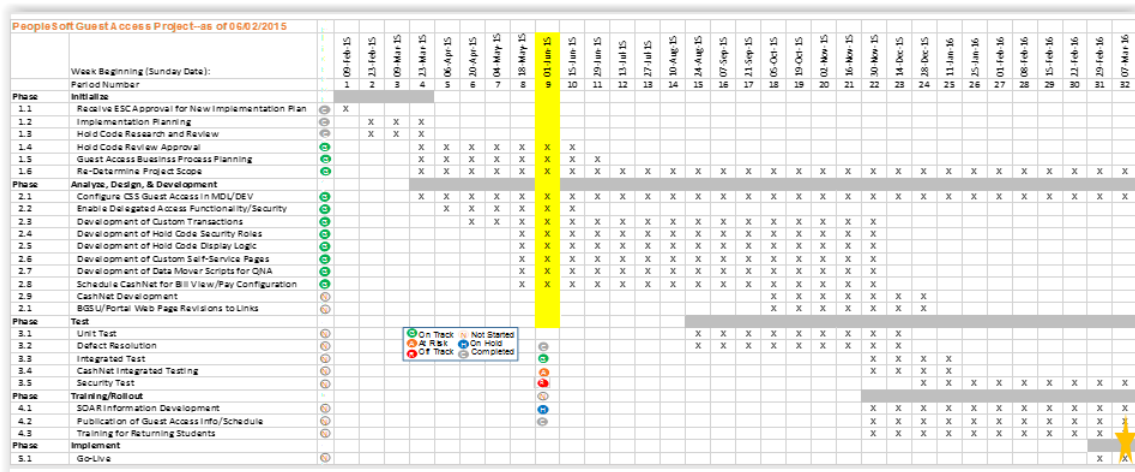
Specific Exclusion from Scope

This project focuses on the PeopleSoft CSS application only. It does not include upgrades to the HCM or FMS applications.

Project Governance Structure

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

Name	Department
Chris Cox	Registration & Records
Andy Grant	Purchasing

Beth Ann Rife	Human Resources
Dawn Chang	Student Employment Services
Bob Swanson	Controller's Office
Chasity McCartney	Bursar's Office
Viva McCarver	Human Resources
Sheri Kellogg	ITS
Phyllis Short	ITS
Matt Haschak	ITS

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

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:
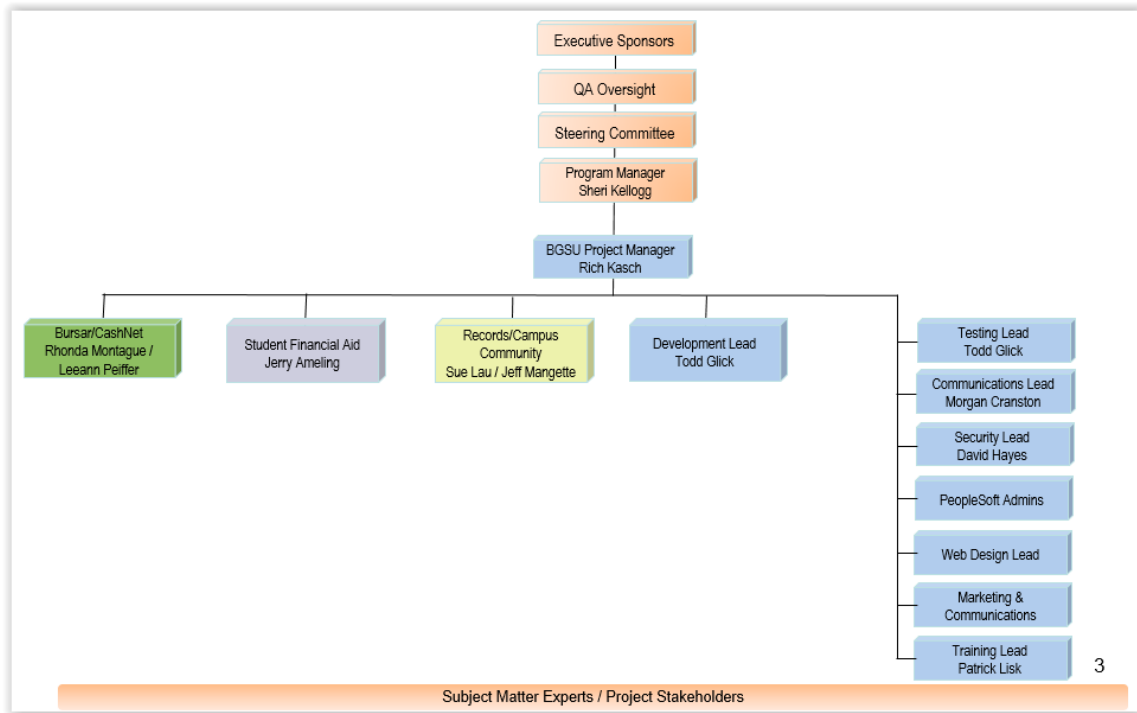
Executive Sponsors will provide approval of the scope and direction for this project; this group includes the following:

Name	Department

Viva McCarver	Human Resources
Michelle Simmons	Enrollment Management
John Ellinger	ITS
Brad Leigh	Business Operations
Sharon Swartz	Controller's Office
Phyllis Short	ITS

Project Issues/Concerns/Risks

The following issues, concerns and risks have been identified for the Access BGSU 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 (students, faculty and staff) must be well informed about the project and any business process changes that could result from the upgrade.
4. Training will need to be conducted for education of existing CashNet account holders, incoming Freshmen students, pilot groups used for integrated testing and Administrative Offices.
5. Security changes will be needed (new permission lists and role assignments) and will need to be addressed as part of the project.
6. Web pages may need to be defined as part of this project to provide a destination where the proxy will be directed when they need to complete their authentication process.
7. Sharing of data must be addressed with a specific statement and enforcement of the BGSU Information Technology Policy. This must be explained, stating specific enforcement consequences and containing a link to the specific policy.

Other Business Areas Affected

This project will affect Faculty, Staff, Students, and any other related entities that use the University's PeopleSoft's CSS application for Access BGSU processes.

Project Resource Requirements

Module	Role	Resource	Commitment %
Project Management			
	Project Director	Sheri Kellogg	5
	Project Manager	Margo Kammeyer	70
	Technical Project Manager	Not Applicable	
	Business Project Manager	?	
	Technical Consultant	Todd Glick	50
Bursar			
	Functional Lead	Chasity McCartney	20
	Functional Lead	Brenda Holderman	
	Functional Lead	Rhonda Montague	20
	Subject Matter Expert (CashNet)	Leann Peiffer	20
	Consultant	CashNet Technical Contact	5
Student Financial Aid			
	Functional Lead	Tina Coulter	20
	Functional Lead	Jerry Ameling	10
Registration and Records			
	Functional Lead	Jeff Mangette	20
	Director	Chris Cox	20
Subject Matter Experts			
	Legal Counsel		5
	Marketing & Communications		5
	Academic Operations	Michelle Simmons	

Module	Role	Resource	Commitment %
IT Technical and Development Resources			
	System Architect	Casey Meyer	10
	Application Administrator	Rick Williamson	2
	Application Administrator	Mark Heider	2
	Security Administrator	David Hayes	10
	Web Application Administrator	Chris Wammes	10
	Outlook Administrator	Chad Bechstein	10
	Application Developer	TBD	10
	Training Lead	Sharon Weimken	5
	Testing Lead	Todd Glick	20
	Communications Lead	Morgan Cranston	5

Estimated Project Budget

Computing Infrastructure Upgrades		
Not applicable		
Sub Total		0

Consulting Services		
Project Management	xxx hours @ $140	
Technical Consulting	xxx hours @ $140	
Functional Consulting	xxx hours @ $140	
Sub Total		0

Other		
Sub Total		

Total for Project	

Project Approval

The following individuals represent the sponsors authorizing this project.

Name	Department
Chris Cox	Registration & Records
Jerry Ameling	Student Financial Aid
Andy Grant	Purchasing
Beth Ann Rife	Human Resources
Dawn Chang	Student Employment Services
Bob Swanson	Controller's Office
Chasity McCartney	Bursar's Office
Viva McCarver	Human Resources
Sheri Kellogg	ITS
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