Phase 2
The HABIT Program
HCM Automation and Business Information Transformation Program
August 21, 2014
CREATING NEW HABITS

It only takes 21 days to form a new HABIT

“Motivation gets you started. HABIT keeps you going”
-Jim Ryun
Agenda

Background / Review
Where Are We?
The Program
Program Timeline and Approach
Program Delivery Model
The Plan for Success
Rules of Engagement
Upcoming Events
Questions
The History of the PeopleSoft Application Road Map Project

Product Support End Dates

<table>
<thead>
<tr>
<th>Release</th>
<th>Extended Support Ends</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSS 9.0</td>
<td>Dec-2018</td>
</tr>
<tr>
<td>CSS/HCM 9.0</td>
<td>Jun-2015</td>
</tr>
<tr>
<td>HCM 9.0</td>
<td>Jun-2015</td>
</tr>
<tr>
<td>HCM 9.1</td>
<td>Sep-2017</td>
</tr>
<tr>
<td>FMS 9.1</td>
<td>Nov-2017</td>
</tr>
</tbody>
</table>
The Projected PeopleSoft Application Road Map

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

Oct 2013
Tools 8.51
Support Ends

Jan 2015
Tools 8.52
Support Ends

Apr 16
EPM 9.1 and
Tools 8.53
Support Ends

Jul 17
Tools 8.54
Support Ends

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.

Updated 1/23/2013
PeopleSoft Application Road Map

Progress to this point

- 4/8/2013 - Formed a project Steering Committee with members from each division to plan the Road Map
- 6/16/2013 - Upgraded CSS/HCM Tools – 8.53.06
- 1/6/2014 - Upgraded FMS Tools – 8.53.06
- 7/19/2014 – CSS/HCM Split Go-Live
- Spring and Summer 2014 - Planning for the HCM upgrade and the HABIT Program was formed
WHERE ARE WE?
We are HERE
The PeopleSoft Application Road – 3 year project

We have:
• Successfully completed 1.5 years of activities

We are:
• On target
• Moving forward
Phase 2 - Planning Activities

- Oracle performed a HCM health check
- Reviewed 9.2 new functionality
- Held multiple scoping sessions with each business area
  - What works
  - What doesn’t
  - Identified opportunities for improvements
  - Identified areas that are nice to have
Planning Outcomes

To be on target / make an impact:

• Phase 2 needed to be MORE than an application upgrade
• Automation of paper based processes
• Improved enterprise reporting
• New application services
The Proposal

Form multiple project workstreams managed under one governance structure working towards the same goal.

Multiple Workstreams + Defined scope = Program Structure

- Reduced overhead
- Alignment of resources
- Testing efficiencies
- One unified governance structure
The Program
Program Scope Introduction

Our Key Objectives:

• Upgrade the PeopleSoft HCM application to ensure supportability
• Increase business efficiencies
• Enhance automation
• Decrease and/or replace paper processes
• Replace de-centralized services with efficient centralized services
• Offer new functionality to improve student university services
• Tie to the AROC opportunities when appropriate
Program Workstreams

- HCM 9.2 Upgrade
  Margo Kammeyer - PM

- Business Automation
  Mike Hachtel - PM

- Guest Access
  Rich Kasch - PM

- Enterprise Reporting
  Steve Letzring - PM
PROGRAM TIMELINE
AND
APPROACH
## Delivery Timeline

<table>
<thead>
<tr>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
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</table>

### HCM Upgrade
- Initialize
- Design
- Develop
- Test
- Train
- Support

### Automation
- Design
- Develop/Deploy
- Develop/Deploy
- Develop/Deploy

### Guest Access
- Design / Develop / Test / Deploy

### Enterprise Reporting
- DW: Phase II
- DW: Phase III
- Transactional Reporting: TBD

- 5/22/2015
- 3/16/2015

**Note:** DW: Phase II and III, and Transactional Reporting are marked with a star (*) indicating key milestones.
PROGRAM DELIVERY MODEL

Governance Structure
Program Governance Structure

Executive Sponsors

Quality Assurance Oversight
B. Ferguson, M. Simmons, J. Ellinger, S. Swartz, B. Leigh, J. Frizado

Program Steering Committee
P. Short, S. Kellogg, D. Chong, B. Rife, C. Cox, M. Haschak, A. Grant, V. McCarver, C. McCartney, B. Swanson, L. Emch

Program Management Structure
Sheri Kellogg

Project Coordinator
Dawn Swain

HCM 9.2 Upgrade
Margo Kammeyer - PM

Guest Access
Rich Kasch - PM

Business Automation
Mike Hachtel - PM

Enterprise Reporting
Steve Letzring - PM
HCM 9.2 Upgrade Workstream
## Minimum Requirements

<table>
<thead>
<tr>
<th>Req. #</th>
<th>Description</th>
<th>9.2</th>
<th>Technical Hours</th>
<th>Functional Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.06</td>
<td>9.2 Time Sheet Settings</td>
<td>✓</td>
<td>28</td>
<td>28</td>
</tr>
<tr>
<td>6.05</td>
<td>Enable 9.2 Flexible Contract Pay</td>
<td>✓</td>
<td>0</td>
<td>56</td>
</tr>
<tr>
<td>9.01</td>
<td>Customizations</td>
<td></td>
<td>192</td>
<td>8</td>
</tr>
<tr>
<td>9.02</td>
<td>Bolt-Ons</td>
<td></td>
<td>104</td>
<td>8</td>
</tr>
<tr>
<td>9.03</td>
<td>Clean Up CSS Data</td>
<td></td>
<td>48</td>
<td>8</td>
</tr>
<tr>
<td>8.02</td>
<td>Remove Row Level Security in HCM</td>
<td></td>
<td>100</td>
<td>26</td>
</tr>
<tr>
<td></td>
<td>Estimated Total Hours</td>
<td></td>
<td><strong>472</strong></td>
<td><strong>134</strong></td>
</tr>
<tr>
<td></td>
<td>Estimated FTE</td>
<td></td>
<td>.75</td>
<td>.25</td>
</tr>
<tr>
<td>Req. #</td>
<td>Description</td>
<td>9.2</td>
<td>Technical Hours</td>
<td>Functional Hours</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>-----</td>
<td>-----------------</td>
<td>------------------</td>
</tr>
<tr>
<td>2.02 (1.10, 1.12, 2.14, 2.15, 2.16, 2.17)</td>
<td>Enable 9.2 New Functionality</td>
<td>✔️</td>
<td>186</td>
<td>220</td>
</tr>
<tr>
<td>2.03 (2.04, 2.05, 2.08)</td>
<td>MSS PAF Functionality</td>
<td>✔️</td>
<td>330</td>
<td>20</td>
</tr>
<tr>
<td>2.01</td>
<td>Create form/process to process Administrative/Unclassified Staff Contracts</td>
<td></td>
<td>330</td>
<td>20</td>
</tr>
<tr>
<td>2.09</td>
<td>Create form/process to submit bi-weekly Compensation Commission Addendum</td>
<td></td>
<td>165</td>
<td>10</td>
</tr>
<tr>
<td>2.19</td>
<td>Create MSS position data request page</td>
<td></td>
<td>60</td>
<td>10</td>
</tr>
<tr>
<td>3.04</td>
<td>Dependent Fee Waiver</td>
<td></td>
<td>160</td>
<td>15</td>
</tr>
<tr>
<td>3.05</td>
<td>Employee Fee Waiver</td>
<td></td>
<td>160</td>
<td>15</td>
</tr>
<tr>
<td>6.01</td>
<td>Integrate OnBase data for faculty contracts into PeopleSoft to calculate manually entered fields for Summer Pay changes.</td>
<td></td>
<td>300</td>
<td>50</td>
</tr>
<tr>
<td>1.07</td>
<td>Enable employee profile functionality to track and capture mandated training and/or required certifications.</td>
<td></td>
<td>90</td>
<td>120</td>
</tr>
<tr>
<td>Estimated Total Hours</td>
<td></td>
<td></td>
<td>1781</td>
<td>490</td>
</tr>
<tr>
<td>Estimated FTE</td>
<td></td>
<td></td>
<td>2.8</td>
<td>1</td>
</tr>
</tbody>
</table>

* Those items in Red cross Functional Areas.
<table>
<thead>
<tr>
<th>Req. #</th>
<th>Description</th>
<th>Technical Hours</th>
<th>Functional Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.10</td>
<td>Create form/process to submit Hourly Student Hires</td>
<td>335</td>
<td>36</td>
</tr>
<tr>
<td>2.11</td>
<td>Create form/process to submit Bi-Weekly Student Hires</td>
<td>Included in 2.10</td>
<td></td>
</tr>
<tr>
<td>1.04</td>
<td>Enable workflow notifications and increase visibility of a student hire status (EHire, GHire) to both the student and hiring department.</td>
<td>Included in 2.10</td>
<td></td>
</tr>
<tr>
<td>1.05</td>
<td>Generate email to student hires that includes required documents, links, next steps, etc.</td>
<td>Included in 2.10</td>
<td></td>
</tr>
<tr>
<td>1.09</td>
<td>Add direct deposit requirement checkboxes to EHire &amp; Ghire which would also update the Person Check List.</td>
<td>Included in 2.10</td>
<td></td>
</tr>
<tr>
<td>1.06</td>
<td><strong>Improve the process for tracking OPERS participation by differentiating the enrollment status and changes in the person checklist.</strong></td>
<td>130</td>
<td>10</td>
</tr>
</tbody>
</table>

| ESTIMATED TOTAL HOURS | 465 | 46 |

| ESTIMATED FTE | .75 | .10 |

* Those items in Red cross Functional Areas.
### Time & Labor / Payroll

<table>
<thead>
<tr>
<th>Req. #</th>
<th>Description</th>
<th>9.2</th>
<th>Technical Hours</th>
<th>Functional Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.01</td>
<td>Configure delegate access to allow a user to delegate time approval.</td>
<td>✓</td>
<td>64</td>
<td>20</td>
</tr>
<tr>
<td>5.02</td>
<td>Establish notifications to supervisors to inform them when there is time waiting to be approved.</td>
<td>✓</td>
<td>64</td>
<td>20</td>
</tr>
<tr>
<td>5.03</td>
<td>Enable 9.2 Timesheet Lockdown</td>
<td>✓</td>
<td>0</td>
<td>56</td>
</tr>
<tr>
<td>5.04</td>
<td>Enable 9.2 Time &amp; Labor Work Center</td>
<td>✓</td>
<td>64</td>
<td>20</td>
</tr>
<tr>
<td>5.05</td>
<td>Enable 9.2 TL Pivot Grid</td>
<td>✓</td>
<td>28</td>
<td>28</td>
</tr>
<tr>
<td>6.04</td>
<td>Create an automated form/process to request changes to contract funding sources. Allow split funding by amounts and percentage.</td>
<td>✓</td>
<td>160</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>Estimated Total Hours</td>
<td></td>
<td>380</td>
<td>159</td>
</tr>
<tr>
<td></td>
<td>Estimated FTE</td>
<td></td>
<td>.60</td>
<td>.25</td>
</tr>
</tbody>
</table>
## Benefits

<table>
<thead>
<tr>
<th>Req. #</th>
<th>Description</th>
<th>9.2</th>
<th>Technical Hours</th>
<th>Functional Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.02</td>
<td>Improve self-service functionality by allowing users to request a life event and upload appropriate documents online.</td>
<td>✔️</td>
<td>40</td>
<td>65</td>
</tr>
<tr>
<td>4.03</td>
<td>Send automated email to employees when there is a change to their benefit enrollment.</td>
<td></td>
<td>Included in 4.02</td>
<td>0</td>
</tr>
<tr>
<td>4.04</td>
<td>Remove as much of the benefit customizations as possible and return to delivered self service functionality. (Question the number of hours)</td>
<td></td>
<td>357</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>Estimated Total Hours</td>
<td></td>
<td>397</td>
<td>65</td>
</tr>
<tr>
<td></td>
<td>Estimated FTE</td>
<td></td>
<td>.65</td>
<td>.10</td>
</tr>
</tbody>
</table>
## Tasks We Can “Do Now”

<table>
<thead>
<tr>
<th>Req. #</th>
<th>Description</th>
<th>Technical Hours</th>
<th>Functional Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.01</td>
<td>Establish a self-service page to allow all employees to declare if they have a disability.</td>
<td>28</td>
<td>28</td>
</tr>
<tr>
<td>11.01</td>
<td>Improve the visibility of FMLA hours tracking and reporting. (Can start any time.)</td>
<td>10</td>
<td>46</td>
</tr>
<tr>
<td>11.04</td>
<td>Ben Admin - Revise Event Class and relevant configuration for clean up – part of day to day activities.</td>
<td>0</td>
<td>210</td>
</tr>
<tr>
<td>3.02</td>
<td>Enable paycheck view in PDF format. (Need to assign.)</td>
<td>64</td>
<td>20</td>
</tr>
<tr>
<td>6.03</td>
<td>Modify commitment accounting set up to add amount as a distribution (currently by % only). Requires lots of testing.</td>
<td>0</td>
<td>70</td>
</tr>
<tr>
<td>1.08</td>
<td>Change Total Hours field on the BGHR021 report (Salary &amp; Wage Report) to Supervisor ID. (Can assign now.)</td>
<td>28</td>
<td>0</td>
</tr>
<tr>
<td>2.06-</td>
<td>Create form/process to submit Job Posting Requests and Job Posting Descriptions – possibly use Web Apps</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.07</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.09</td>
<td>Create form/process to submit Bi-Weekly Compensation Addendum.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.02</td>
<td>Establish an automated method to change the payroll funding source for FWS eligible students. (Can start now – Sarat.)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
HCM 9.2 Upgrade - Structure

Executive Sponsors

QA Oversight

Steering Committee

Program Manager
Sheri Kellogg

BGSU Project Manager
Margo Kammeyer

Technical Project Manager
Johan Niemkamp

Core HR / SES SME
Beth Ann Rife / Jason Dunn
Michele Schmitz

ITS Technical Lead
Mike Failor

Functional SME
Heather Kowalski

Benefits SME
Beth Ann Rife / Jason Dunn
Sandy Heck

ITS Technical Lead
John Konecny

Functional SME
Heather Kowalski

Development Lead
Todd Glick

Developer
Carol Christman

Developer
Erik Eid

Testing Lead
Rich Kasch

Communications Lead
Morgan Cranston

Security Lead
David Hayes

PeopleSoft Admins
M. Heider, R. Williamson

Infrastructure Lead
Kevin Gilreath

Server and Database Admin
C. Meyer, N. Carney

Training Lead
Patrick Lisk

Subject Matter Experts / Project Stakeholders
HCM 9.2 HCM Environments

HCM Upgrade Proposed Project Testing Cycles

<table>
<thead>
<tr>
<th>Environment</th>
<th>DEV Environment</th>
<th>QNA Environment</th>
<th>PPD Environment</th>
<th>Final Production Cutover</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refresh Scripts</td>
<td></td>
<td>Refresh Scripts</td>
<td>Refresh Scripts</td>
<td>Refresh Scripts</td>
</tr>
<tr>
<td>HCM52DEV (8.53) (9.0 Environment)</td>
<td></td>
<td>HCM52QNA (8.53) (9.0 Environment)</td>
<td>HCM52QNA (8.53) (9.0 Environment)</td>
<td>HCM52PPD (8.53)</td>
</tr>
<tr>
<td>Apply Application Upgrades</td>
<td></td>
<td>Apply Application Upgrades and Rework</td>
<td>Apply Application Upgrades and Rework</td>
<td>Apply Application Upgrades and Rework</td>
</tr>
<tr>
<td>Target</td>
<td>HCM52DEV (8.53) Available 9/14/2014</td>
<td>Target</td>
<td>HCM52QNA (8.53) Available 4/14/2015</td>
<td>Target</td>
</tr>
<tr>
<td>ITS</td>
<td></td>
<td>System Testing</td>
<td>(1/12 – 2/20/2015)</td>
<td>Integration</td>
</tr>
</tbody>
</table>

User Testing: HCM92QNA available from 10/6 – 12/12/2014. HCM92QNA will be cloned to HCM92PPD as we change environments.

Note: In order to provide an environment for User Testing prior to System Testing, HCM92QNA and HCM92PPD will be available for specific time periods to verify development, learn 9.2 functionality and verify environments. These are temporary environments and may not be fully functional. HCM92QNA will be cloned to HCM92PPD as we change environments.

Date: 5/22 – 5/23/2015
Delivery Timeline

<table>
<thead>
<tr>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
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</tr>
</tbody>
</table>

- Initialize
- Design
- Develop
- Test
- Train
- Support

5/22/2015
Guest Access Workstream
Guest Access Project Highlights

• PeopleSoft delivered functionality
• Parent Portal
• Electronic FERPA
• Transactions to Configure
  o Contact Information (phone number, email, addresses)
  o Emergency Contacts
  o To Do List
  o Holds
  o CashNet (custom configuration)
• Custom Transactions to Configure
  o Student Financial Aid Awards
  o Student Final Grades
## Guest Access Timeline

<table>
<thead>
<tr>
<th>May</th>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
<th>December</th>
<th>January</th>
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<tbody>
<tr>
<td>2014</td>
<td></td>
<td></td>
<td></td>
<td>2014</td>
<td></td>
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</tr>
</tbody>
</table>

**Guest Access**

Design / Develop / Test / Communicate / Deploy

3/16/2015
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
- Component(s) to delegate
- Student
- Parent

**Delegated Access**

**Transaction**

**Delegator**

**Proxy**
Guest Access – How Does It Work?

An Overview of the Delegated Access Process

The diagram illustrates an overview of the delegated access process:

- **Setup**
  - Define what can be delegated

- **Delegator**
  - Delegator delegates access to a proxy

- **System**
  - Both Delegator + proxy are notified at the time of delegation.
  - Proxy email includes a URL to access school system.

- **NUR (Proxy logs in)**
  - Proxy uses an existing User ID or creates a new one

- **Proxy Terms & Cond.**
  - Proxy accepts the Terms & Conditions and SUBMITS

- **Proxy user experience**
  - Proxy navigates to the “Shared Information Center”
**Guest Access Project Deliverables**

- PeopleSoft supported Guest Access implementation.
- Guest Access web site.
- Security changes to support the new process.
- Communication to all users about the process functionality and how that will coordinate with existing CashNet account holders.
- Creation of processes to educate incoming Freshmen and their parents about Guest Access during the SOAR experience.
- Communication plan for relaying project information to Executive Sponsors, Steering Committee members, Functional Areas, and the entire campus as needed.
- Training for the BGSU Administrative Office resources.
Guest Access Project Deliverables

- Social media opportunities for student to become engaged with the Guest Access process.
- 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.
- Web page(s) representing the destination of the proxy authentication process and any on-line help for navigating the Guess Access pages.
BUSINESS AUTOMATION WORKSTREAM
Business Automation Highlights

• Employee On-Boarding / Off-Boarding
• Employee and Dependent Fee Waivers
• Student Employee Services (SES) Hiring process
• Centralizing application security requests and automating approval process
• Personnel Action Form
Business Automation - Structure

Executive Sponsors

QA Oversight

Steering Committee

Program Manager Sheri Kellogg

BGSU Project Manager Mike Hachtel Technical Project Manager Matt Haschak / Andy Grant

Web Development Lead Chris Wammes
Business Analyst Stephanie Sickler Functional SME David Hellman

Testing Lead
Communications Lead Morgan Cranston
Security Lead David Hayes
PeopleSoft Admins M. Heider, R. Williamson
Infrastructure Lead
Database Admin Norm Carney
Training Lead Patrick Lisk

Subject Matter Experts / Project Stakeholders
Enterprise Reporting Workstream
Enterprise Reporting Highlights

• Provide delivery of the top 10 information requirements
• Provide data delivery method that best meets user needs (query / static report) for all areas of campus (Academic and Administrative)
• Reduce security constraints on existing PeopleSoft reports
• Extending the business analytics
• Right Data, Right Time, Right Results
Delivery Timeline

<table>
<thead>
<tr>
<th></th>
<th>June</th>
<th>July</th>
<th>August</th>
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<th>May</th>
</tr>
</thead>
</table>

Enterprise Reporting

- DW: Phase II
- Academics
- Class Capacity
- Course Attribute
- Potential students

DW: Phase III
- Degrees Awarded
- Financial Aid

Transactional Reporting: TBD

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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 Marys”

Projects in Progress as of 8/21/2014

• FACEs Phase 2
• Agilon One Application Road Map
• Bookstore Opt-in Changes – Refunds
• ACA Reporting
• StarFish Upgrade
• Prescription Changes

• Grants Pre-Approval Process – Smart ERP Implementation
• Chrome River
Celebrating Success

- Project Team Involvement
- Quality Work
- Celebrating the Milestones
Vacation Schedules

- Please communicate all scheduled vacations ASAP

HCM 9.2 Upgrade projected black-out periods

- These dates are 1 week before and 1 week after the HCM 9.2 Upgrade Go-Live scheduled for the weekend of May 22, 2015
- Exceptions will be coordinated / approved as one-offs
Plans for Communication

Project Meeting Structure

- Bi-weekly Program Steering Meetings
- Weekly Project Meetings (determined by work stream) Technical Team and Functional Leads
- Monthly QA Meetings (Business Area Leadership Representation)
- Monthly Executive Sponsors Meetings – formal update

Open Forums

- Regular Open Forums for project updates for all interested parties

Project Web Site – [www.bgsu.edu/habit](http://www.bgsu.edu/habit)

- Project Time Line
- Testing Schedule
- Risk and Issues

Team Communications

- Listservs to be created to have a consistent communication channel
Upcoming Events

Next Open Forum
September 18
BA 111 @ 2PM

Project web site
www.bgsu.edu/HABIT

Project email address
HABIT-Program@bgsu.edu
Questions and Answers