

1. Project Charter

Stakeholder Name	Department
Cecilia Castellano	Admissions
Chris Cox	Registrar
Laura Emch	Enrollment Management
Andy Grant	Business Operations
Sheri Kellogg	ITS
Chastity McCartney	Bursar's Office
Beth Ann Rife	Human Resources
Phyllis Short	ITS
Michelle Simmons	Enrollment Management
Brian Skelding	Controller's Office
Sharon Swartz	Controller's Office

Project Title: PeopleSoft CSS / HCM Split

Description:

Support for HCM 9.0 ends in June 2015. CSS 9.0 will continue to be supported through 2018, but HCM will only be supported past June 2015 if it is upgraded. In order to upgrade HCM, BGSU must first split HCM and CSS into two different databases and environments. This project addresses splitting the databases and applications. During this project, BGSU will begin planning the HCM upgrade to 9.2. The actual upgrade of HCM will be the second phase (project) of the PeopleSoft Road Map program.

Project Manager Assigned: Margo Kammeyer

Director approving budget/assigning staff : Sheri Kellogg

Business Case (*Why is project being done? On what financial or other basis can we justify doing the project? Describe the project purpose and justification.*)

BGSU has invested in Oracle's PeopleSoft suite of applications as the University's ERP (enterprise resource planning) system. The ERP system provides for the integration of data and processing into a unified system that provides for maximum information integration and accessibility throughout the University. 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, and Payroll. 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

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 must be performed. The CSS and HCM applications currently share the same Oracle 11.2.0.3 database. The split must take place first because Oracle does not support moving to HCM 9.1 or 9.2 while the database is being shared. This project includes moving the environments from a shared set of physical servers to separate Virtual Machines (VM's). This phase of the Road Map is expected to take place from January 2014 – June 2014.

Phase 2 – HCM Upgrade

Once the CSS/HCM database is split into separate databases, BGSU will begin the project to immediately upgrade HCM from 9.0 to 9.2. Since support ends for HCM 9.0 in June 2015, it would be our goal to complete this upgrade by December 2014.

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.

Deliverables *(What specific deliverables are wanted, and what will be the end result of the project?)*

- Database split that will result in separate Oracle databases for CSS and HCM.
- Architecture hardware changes to accommodate the CSS/HCM split.
- An inventory of common data elements and PeopleSoft Integration Broker messages that need to be synchronized across the separated instances.
- Implementation of new messaging integrations between CSS and HCM.
- A strategic approach to delivering a role-based security matrix post-split.
- Documented core business process testing plans that can be leveraged during the next phase of the PeopleSoft Road Map program.
- Communications plan for relaying project related information to Executive Sponsors, Steering Committee members, Functional Areas, and the entire campus as needed.
- Risk and issues management processes to mitigate risk and proactively address known issues.
- Detailed project plan with resources, tasks, and duration identified for the Phase 2 - HCM upgrade to 9.2.

Objectives *(How does the project tie into the organization’s strategic goals? What project objectives support these goals?)*

BGSU has developed a PeopleSoft Application Road Map for our CSS, HCM, and FMS systems that ensures our sustainability under Oracle support through 2018. In order to stay on target, we must split our current CSS environment into a CSS (for students) and HCM environment in early 2014, and then immediately upgrade the HCM environment from 9.0 to 9.2.

Project Risks *(Potential threats for the project)*

This project could be impacted if the below risks are not taken into consideration:

- This project has University-wide impact and any issues could affect numerous functional areas and business processes.
- Sufficient business area resources will need to be allocated to work on this project and conduct functional area testing within the project timeframe.
- The University community must be well informed about the project and any business process changes that could result from the split.
- Training may need to be conducted for any business process changes.
- The split will increase the likelihood that data sync issues could occur if not adequately identified, tested, and accounted for.
- There may be a need to apply patches/fixes to production and project environments during the project.
- Queries and reporting will be affected by the split.
- Role-based security will need to be addressed as a core component to ensure appropriate access after the split.

Success Criteria *(The success of this project will be measured by the following criteria.)*

- Accurate identification and adherence to requirements, scope, project plan, key decisions, change management, risk/issues management, and testing processes.
- On-going communication to the University community, project sponsors and affected business offices.
- Documented and executed functional area test plans that include the testing of person bio/demo and job data additions, maintenance, and deletions.
- Separated Oracle databases for CSS and HCM.
- Implementation of appropriate role-based security.
- Identification and resolution of data sync issues.

Project Approval *(What items need to be approved and who will have sign-off?)*

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

Name	Department
Cecilia Castellano	Admissions

Chris Cox	Registrar
Laura Emch	Enrollment Management
Michelle Simmons	Enrollment Management
Beth Ann Rife	Human Resources
Sharon Swartz	Controller's Office
Brian Skelding	Controller's Office
Chastity McCartney	Bursar's Office
Andy Grant	Business Operations
Sheri Kellogg	ITS
Phyllis Short	ITS

Project Sponsors Authorizing the Project

(Name, Title)

(Name, Title)

(Name, Title)

(Name, Title)

(Name, Title)

(Name, Title)

(Name, Title)

(Name, Title)

(Name, Title)

(Name, Title)

(Name, Title)

(Name, Title)

2. Project Scope

Project Background and Description *(Copy and paste the project background and description from the project charter. Or describe how this project originated, who is involved, and what the purpose is.)*

BGSU has invested in Oracle’s PeopleSoft suite of applications as the University’s ERP (enterprise resource planning) system. The ERP system provides for the integration of data and processing into a unified system that provides for maximum information integration and accessibility throughout the University. 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.

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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
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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 must be performed. The CSS and HCM applications currently share the same Oracle 11.2.0.3 database. The split must take place first because Oracle does not support moving to HCM 9.1 or 9.2 while the database is being shared. This project includes moving the environments from a shared set of physical servers to separate Virtual Machines (VM’s). This phase of the Road Map is expected to take place from January 2014 – June 2014.

Phase 2 – HCM Upgrade

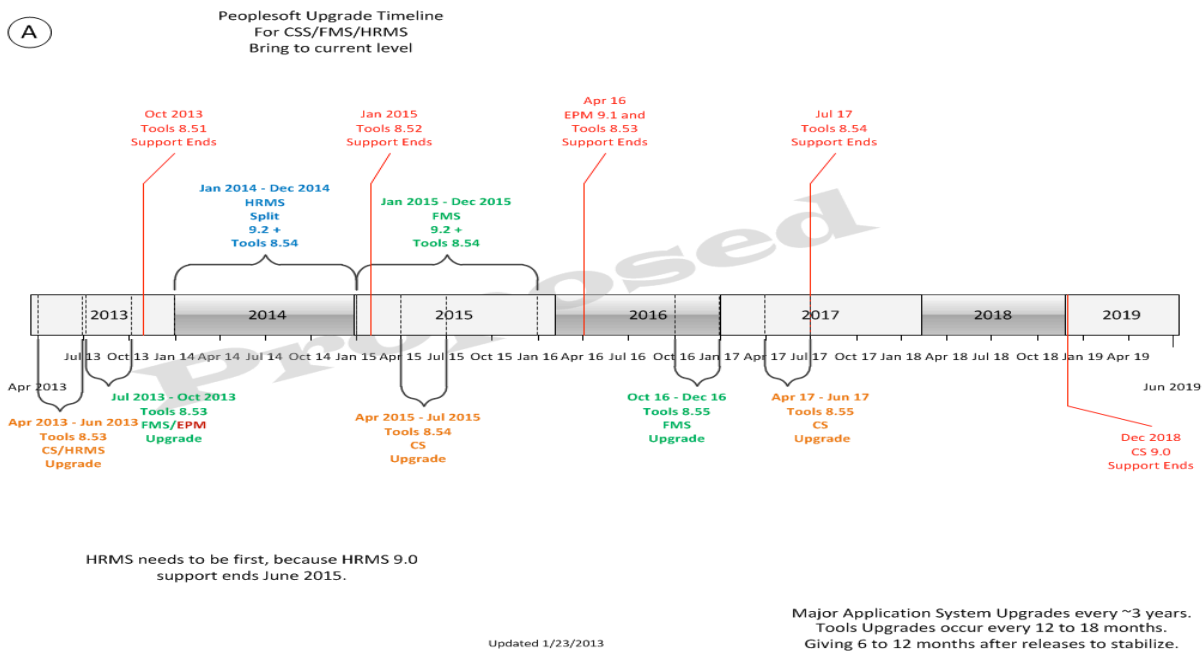
Once the CSS/HCM database is split into separate databases, BGSU will begin the project to immediately upgrade HCM from 9.0 to 9.2. Since support ends for HCM 9.0 in June 2015, it would be our goal to complete this upgrade by December 2014.

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.

PeopleSoft Application Road Map Timeline

The below chart presents the proposed PeopleSoft Application Road Map timeline.



As part of this project, BGSU has retained the consulting services of Navigator Management Partners to help us

execute our PeopleSoft Application Road Map. We are looking to Navigator to deliver key technical expertise relating to the CSS / HCM split as well as technical Project Management, and functional consulting services for the CSS and HCM applications. In addition to the split project, Navigator will assist us in preparing for the HCM 9.2 upgrade project. The HCM upgrade itself is not part of the scope of this Phase 1 project, however we will begin upgrade planning in Phase 1.

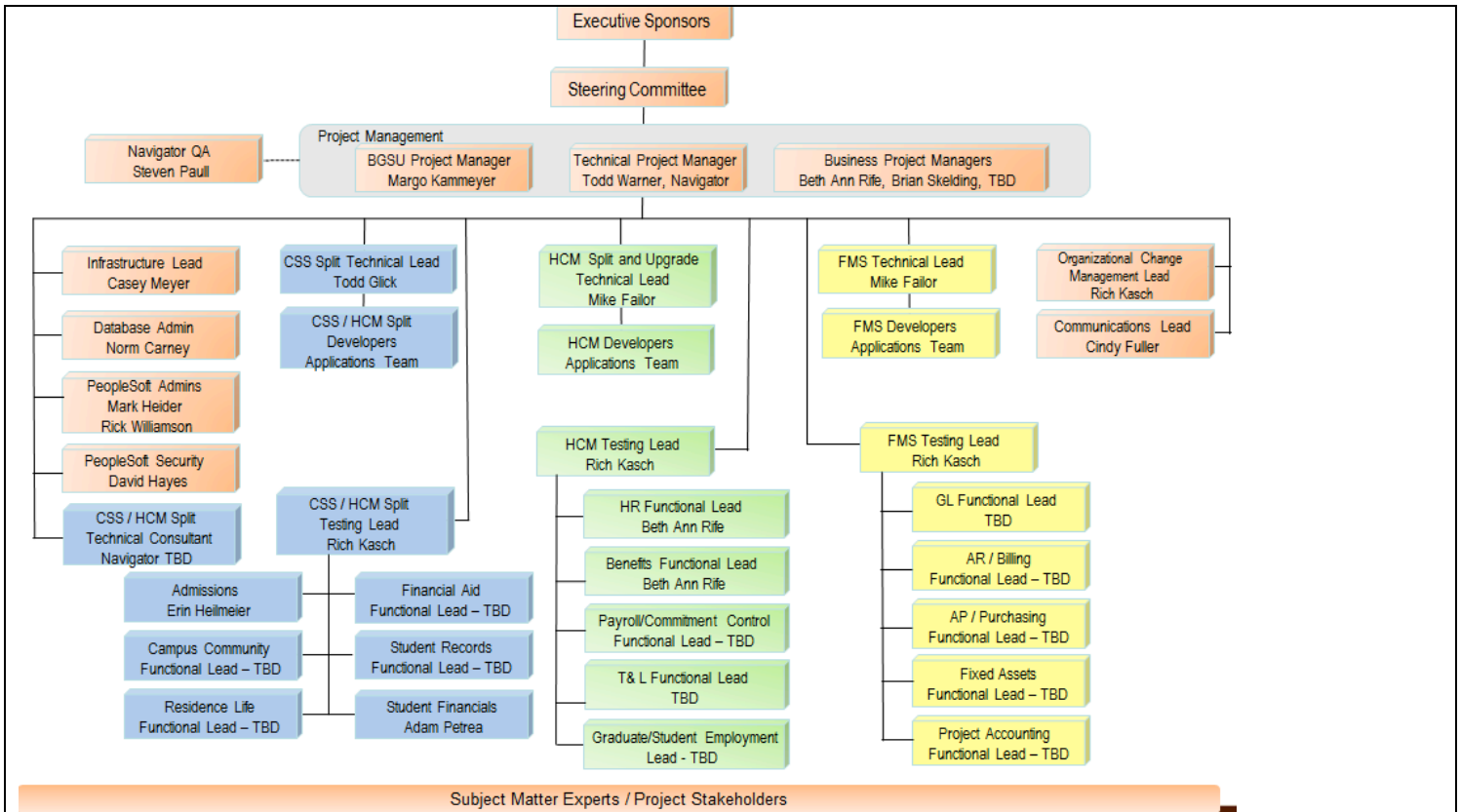
The Steering Committee for the CSS/HCM project will include the following:

Name	Department
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Sharon Swartz	Controller's Office
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Chastity McCartney	Bursar's Office
Andy Grant	Business Operations
Sheri Kellogg	ITS
Phyllis Short	ITS

The ITS Project Team Members may include Steering Committee members as well as, but not limited to, the following individuals:

Name	Department
Margo Kammeyer	ITS – Project Manager
Todd Warner	Navigator – Technical Project Mgr.
Todd Glick	Sr. Applications Developer
Mike Failor	Sr. Applications Developer
Rick Williamson	Enterprise Applications Admin.
Mark Heider	Enterprise Applications Admin.
David Hayes	Security Analyst
Rich Kasch	Systems Analyst
Norm Carney	Database Administrator
Casey Meyer	Sr. Systems Administrator
Cindy Fuller	Communications

The overall governance structure for the PeopleSoft Application Road Map is as follows:



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.

Scope *(This is the boundary of the project. What is the scope of the project? Also include what is out of scope for this project.)*

The scope of this Phase 1 project is limited to those activities related to the CSS/HCM Split and to the initial planning efforts of the HCM upgrade to 9.2 only. These activities include:

- Splitting out the combined Oracle Database and creating separate Oracle databases for CSS and HCM.
- Implementing architecture changes to accommodate the CSS/HCM split.
- Identifying common data elements and PeopleSoft Integration Broker messages and synchronizing them across the separated instances.
- Implementing the Owner-Subscriber model to publish messages between CSS and HCM.
- Implementing role-based security in the post-split environment.
- Documented and executed functional area test plans that include the testing of person bio/demo and job data additions, maintenance, and deletions.
- Working with the functional leads to identify and address potential impact to business processes.
- Developing a strategy for addressing query and reporting changes.
- Planning for the HCM upgrade to 9.2.

High Level Requirements *(Describe high level requirements or must haves.)*

- To ensure our sustainability under Oracle PeopleSoft support through 2018 for CSS, HCM, and FMS applications.
- Separated CSS and HCM database environments.
- Business office and ITS leadership and co-ownership of key decisions impacting the CSS/HCM split.
- Effective communications for relaying project related information to Executive Sponsors, Steering Committee members, Functional Areas, and the entire campus as needed.
- Identification of business process changes resulting from the split.
- Risk and issues management process to mitigate risk and proactively address known issues.
- Functional lead ownership of the testing process and the use of step by step user testing plans.
- Implementation of role-based security.
- Working queries and reports after the split.
- Determine the scope of the Interaction Hub (Portal) as it relates to single sign-on and ease of processing transactions that include both Personal and Job Data (hire transactions).
- During the split project, we would like to look at functionality that has been delivered within the last couple of releases and evaluate new features and functionality that we do not currently have implemented.

Deliverables *(List the deliverables that you expect as a result of this project.)*

- Database split that will result in separate Oracle databases for CSS and HCM.
- Architecture hardware changes to accommodate the CSS/HCM split.
- An inventory of common data elements and PeopleSoft Integration Broker messages that need to be synchronized across the separated instances.
- Implementation of new messaging integrations between CSS and HCM.
- A strategic approach to delivering a role-based security matrix post-split.
- Documented core business process testing plans that can be leveraged during the next phase of the PeopleSoft Road Map program.
- Communications plan for relaying project related information to Executive Sponsors, Steering Committee members, Functional Areas, and the entire campus as needed.

Constraints and Assumptions *(List constraints and assumptions.)*

- Functional leads will need to be assigned for each functional area impacted by the CSS / HCM split.
- 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.
- BGSU has selected Oracle's Owner Subscriber model for this split. Business processes may change for this subscribing system for employee or student data entry, including self-service.
- Any data discrepancies between the environments will need to be individually addressed.
- A high level data correction strategy will need to be created and documented.

Affected Colleges and Departments *(Describe departments, faculty and staff that will be impacted by this project.)*

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

Affected Business Processes or Systems *(List the business processes or systems which will be impacted by this project and how they will be impacted.)*

Phase 1 of the PeopleSoft Application Road Map will directly affect all CSS and HCM related processes and interfaces throughout the University.

The areas affected include, but are not limited to:

- All University Human Resource functions
- All University benefits functions
- Student Administration
- Campus Community – bio and demographic information
- Admissions
- Student Records – class schedule, registration, grades, transcripts
- Student Financials
- Financial Aid
- Payroll

- Residence Life

Specific Exclusion from Scope *(Describe specific business processes that are excluded from this project.)*

This project will focus on Phase 1 of the PeopleSoft Application Road Map only. Phases 2 and 3 will be implemented under a separate statement of work; however we will begin planning Phase 2 activities during Phase 1.

This project does not include the dedicated services of a Student Records functional consultant. If required, these services could be obtained through a separate statement of work and budget.

Implementation Approach *(Describe how you plan to implement this project. Will it be one deployment or have several phases?)*

The PeopleSoft Application Road Map consists of 3 phases that will ensure our sustainability under Oracle support through 2018.

Phase 1 – CSS/HCM Database Split.

Phase 2 – HCM Upgrade from version 9.0 to version 9.2.

Phase 3 – FMS Upgrade from version 9.1 to version 9.2.

High Level Timeline/Schedule *(Describe what the high level timeline will be to plan, design, develop and deploy the project. When do you expect this project to be completed?)*

Phase 1: CSS/HCM Split – timeline is expected to be January 2014 – June 2014.

3. Cost Savings

(Explain what the costs are of not doing this project? What are potential costs savings?)

This project is required in order to ensure our sustainability under Oracle support through 2018.

4. Project Budget

Funding Source(s) *(Describe by whom and how the project will be funded.)*

Funding has been approved for this project.

Funding of 2000 hours has been approved for Navigator consulting services for Phase 1.

Initial Costs

Hardware – There will be no new hardware costs.

Description	Cost	Quantity	Total
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			\$0.00
			\$0.00
			\$0.00
			\$0.00
Subtotal			\$0.00

Software – There will be no new software costs.

Description	Cost	Quantity	Total
			\$0.00
			\$0.00
			\$0.00
			\$0.00
Subtotal			\$0.00

External Professional Services – Navigator Consulting Services. See SOW.

Description	Cost	Quantity	Total
			\$0.00
			\$0.00
			\$0.00
			\$0.00
Subtotal			\$0.00

BGSU Internal ITS Staff (average hourly ITS administrative and classified staff rate including benefits is \$36.77)

Description	Cost	Quantity	Total
			\$0.00
			\$0.00
			\$0.00
			\$0.00
Subtotal			\$0.00

Other BGSU Internal Staff (average hourly rate including benefits is \$____)

Description	Cost	Quantity	Total
			\$0.00
			\$0.00
			\$0.00
			\$0.00
Subtotal			\$0.00

Training			
Description	Cost	Quantity	Total
			\$0.00
			\$0.00
			\$0.00
			\$0.00
Subtotal			\$0.00
Other/Misc. Expenses			
Description	Cost	Quantity	Total
			\$0.00
			\$0.00
			\$0.00
			\$0.00
Subtotal			\$0.00
Contingency (%15)			\$0.00
Projected Total Initial Cost			\$0.00

Ongoing Costs			
Hardware			
Description	Cost	Quantity	Total
			\$0.00
			\$0.00
Subtotal			\$0.00
Software			
Description	Cost	Quantity	Total
			\$0.00
			\$0.00
Subtotal			\$0.00
External Professional Services			
Description	Cost	Quantity	Total
			\$0.00
			\$0.00
Subtotal			\$0.00
BGSU Internal ITS Staff (average hourly ITS administrative and classified staff rate including benefits is \$36.77)			

Description	Cost	Quantity	Total
Subtotal			
Other BGSU Internal Staff (average hourly rate including benefits is \$_ _ . _ _)			
Description	Cost	Quantity	Total
Subtotal			
Training			
Description	Cost	Quantity	Total
			\$0.00
			\$0.00
Subtotal			\$0.00
Other/Misc. Expenses			
Description	Cost	Quantity	Total
			\$0.00
			\$0.00
			\$0.00
Subtotal			\$0.00

Projected Ongoing Costs	\$0.00
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Approval and Authority to Proceed

We approve the project as described above and authorize the team to proceed.

Name	Signature	Title	Date
Name	Signature	Title	Date
