

**HCM Implementation Team Leads**  
**Meeting Notes**  
**1 p.m., October 18, 2005, AD-231**

Present: Boish, Covey, Foye, Furze, Goodell, Lix, Medina, Ross, Suelzle, Trivedi, Venter, Winrow

Absent: Cunard, Mitchell

**CMS Update:** Cyndie reported on the Project Directors meeting she attended on October 13:

The dates for the move from the Unisys system to the Data Center system in Salt Lake have been locked down. SDSU is in the first wave—beginning toward the end of December and live by February 1. During that transition there will be a code freeze; this means that no COMRs can be submitted during that time.

Our 8.0 TRN instance will be upgraded tomorrow to the 9i database. The DEV instance will be cloned from the upgraded TRN instance.

It is felt that the 21<sup>st</sup> Century payroll project is now positioned for success (because of current state politics and a new State Controller). Both campus records and State Controller's Office records will be considered legal records for purposes of subpoenas. Data for the current year and two previous years will be converted from PIMS to SAP; older data will be housed in a data warehouse. There are no training materials for the 21<sup>st</sup> Century self-service pieces. There will be a bidirectional interface, which will allow for easier handling of General Salary Increases (GSIs). There is talk of a single sign on interface between the SCO and CMS. **Cyndie will send out the scope document on the 21<sup>st</sup> Century project.**

A support model for handling upgrades is being developed. It is planned that CMS-SOSS will be the only technical consultant available to the campuses for upgrades. This idea has been tried out at the two pilot campuses—San Bernardino and San Jose—and has met with success. The Project Directors will be voting soon on whether this will be the model for the future. Campuses will probably have to bear the costs.

Mark Collins from Oracle attended the PD meeting and reported that Fusion is expected to be out in January 2009. The Chancellor's Office does not expect to begin looking at the product until it has been on the market for at least a year. Because it is not expected that Fusion's implementation on CSU campuses will be complete until December 2012, Oracle will continue to support applications currently being used until then.

There was a discussion of how many instances each campus should be limited to and whether there will be instances shared among campuses.

A draft Data Warehouse Implementation Plan was distributed. They are working on the core scripts for HR and Finance. Scripts for HCM will be done later, but no date is yet targeted. The data warehouse will be hosted on the campus and run by us.

**Oracle Update:** Pat introduced Peggy Lix, who will be working with us on Base Benefits, Benefits Administration, and Workforce Development.

Pat discussed the difference between a strategy and a plan. Our strategies will document how we plan to go forward, and our plans will document the tasks needed in order to implement our strategies.

**Team Lead Updates:** Jennifer mentioned several upcoming HUG subcommittee teleconferences. Meeting Maker proposals will be sent to the appropriate team members so that they can participate on the calls in the Project Office.

Ralph reported that he is arranging for a conference call with Elizabeth O'Shea to discuss (1) data conversion from CIRS to HCM and (2) the possibility of an updated Legacy Conversion document, which was written for 8.0. It is hoped that the call will take place tomorrow morning.

**Mission Statement:** Cyndie distributed a summary of the various versions of the Mission Statement. The version suggested by Sydney could be divided—the first paragraph being a high-level vision of where we are going and the second paragraph being a statement of how we plan to get there. **Team members were asked to review the document and get feedback to Cyndie by Friday.**

**Data Cleansing:** Ralph and Michael distributed a number of documents:

- HCM 8.9 Implementation Data Cleansing Strategy.
- SDSU Data Cleansing HCM 8.9 Overview.
- Two sample pages from data source spreadsheet.
- Data cleansing timeline.

Ralph and Michael discussed the data cleansing strategy (using the Overview document as a guide because the Strategy document is written in a fairly technical manner). The first step in data cleansing is identifying as many data sources as possible and as many known issues with the data as possible (e.g., missing data, inaccurate data, duplicate data, etc.). It is important that functional team members participate in this process as fully as possible, because they are the ones most familiar with the business processes of each office. **Ralph will be emailing the data source spreadsheet to each of the functional team leads and to the technical team. He asked that those receiving the spreadsheet enter as much information as possible and return it to him and to Michael by Friday, October 28.** The first worksheet in the spreadsheet is where information about data sources (name, data type, frequency of update, and data content) should be entered. Data issues should be entered on the other worksheets (one for each module). Ralph and Michael will then consolidate the individual replies into a single spreadsheet.

Pat added that data cleansing always turns out to be a larger task than it appears at first; cleaning up one element often reveals three or four problems that had been hidden before. However, tools will be rolled out to assist in the cleansing process, and the strategy calls for multiple iterations of testing. The “scripts” that are developed as part of the data cleansing process will be used as the basis for the “scripts” for configuration testing.

We will work with the assumption that Red ID will serve as the EmplID unless we disprove that as a fatal flaw for SDSU (this means we’ll be making an external call using the SAC package to the RedID names table in order to retrieve and/or gen a new RedID, and use as the EmplID).

**Project Library:** The library of HCM project documents can currently be found in the CMS file share on the kanga server. Cyndie will be submitted a service request to have the file share renamed “HCM.” There will separate branches—one that everyone will be able to update, one for project management documents, which only Pat, Cyndie, or Janet H. will be able to update.

**BNAs and Fit Gaps:** A list of Module Fit Gap Teams was distributed. **Team members were asked to send any suggestions or changes to Cyndie as soon as possible.**

Veer and Jennifer are working on detailing which processes will need to be addressed in which fit gap session.

Pat distributed the template that will be used to record the process and results of each module’s fit gap and went through the template’s sections. The goal of the fit gap process is to allow us to hit the Configuration stage intelligently. The Business Needs Assessments are just that portion of the usual fit gap process that takes place before the software is looked at. A fit gap is defined as a portion of current business process that the software will not accomplish. An issue is something we are not sure will work the way we want it to when we get to Configuration. The focus at this point is the identification of the fit gaps, not in trying to find solutions for them.

**Functional teams should be currently documenting their business processes—and there will be a lot of them—all the entering of data that needs to be done, all the reporting that needs to be done, all the exporting/importing of data that needs to be done, etc.** Having these inventories of the business processes prepared before the BNAs/fit gaps will greatly speed up the process.

**Project Charter:** Pat distributed the draft cover sheet and table of contents for the Project Charter. This document will detail the “rules of engagement” for the completion of the project.

**Open Discussion:** There as a brief discussion of whether we will be in a position to take advantage of electronic workflow for faculty personnel action data when we go live

CMS Team Leads  
Page 4 of 4  
October 18, 2005

in July 2006 or whether that will be phased in. It is hoped that the fit gap process will generate the necessary information to answer this question.

Some of next week's agenda items will be:

- Scope Document (Jennifer and Veer).
- Directory Structure (Cyndie).
- Mission Statement (Cyndie).