

HCM Implementation Team
Meeting Notes
1 p.m., February 28, 2006, AD-231

Present: Best, Boish, Covey, Cunard, Foye, Furze, Goodell, Lix, Mitchell, Moyers, Suelzle, Tavalazzi, Venter, Winrow

Absent: Delgado, Medina, Ross, Trivedi

Pat's Schedule: As Pat begins to assemble central lists of issues, interfaces, and modification recommendations from the information in individual fit/gap documents he will be spending a few days in the HR area so that he will have quick access to team members should he have questions.

Steering Committee Update. Cyndie reported on the Steering Committee meeting on February 22. The following topics were discussed at that meeting:

- A couple of the major changes that will be coming to campus business processes, such the self-service part of Time and Labor.
- Recommendations for some modifications will be coming to the Steering Committee as a result of the fit/gap process, including several in Recruiting. The committee discussed in some detail the implications of Coded Memo HR 2006-03, which outlines information that must be obtained from each person being offered employment at a CSU campus.
- The delay in the delivery of the SYS database from CMS Central because of the work being done on the Data Center transition.
- The schedule for SDSU's participation in the Data Center transition—testing at the end of March, cutover at the end of April.
- The project timeline, including information on some staffing concerns and a couple of the current risks.
- The need for the Steering Committee to make decisions as issues come to them. Pat and Cyndie will be putting together a list of issues to be presented to the committee for decisions. Team Leads should be consulting with their Steering Committee members on an individual basis as well.
- The white papers currently being written on the departmental user interface (DUI), on the imaging system, and on the centralized/decentralized issue. The Steering Committee thought it prudent to proceed with the plan to prototype the DUI with a paper form. This form will include all fields necessary to accommodate all faculty/staff personnel actions, with the fields named and arranged in such a way as to make the transition to an electronic HCM connection easy.

MarkView: Cyndie's concerns about what all would need to be done to the Markview workflows in order for them to function properly with HCM have been allayed by the work done by team members from HR. Instead of modifying existing workflows, two new workflows will be built. Cyndie has a call with the folks from 170 Systems scheduled for March 20 to discuss this further.

SYS Database Schedule: The SYS database will be a clean, pre-Baseline database with CMS-delivered configuration but no data. Originally scheduled for delivery from CMS to SDSU in January, its delivery date has been revised again from today to March 6 at the earliest (possibly as late as March 10). The delay, caused by CMS's need to dedicate its technical staff to the Data Center transition and to San Jose going live today, puts our configuration five weeks behind schedule. In order to maintain the current Go Live date, testing schedules will be adjusted.

Environment Management: (See document *Database Environments, 2006-03-01.*) When we receive the SYS database, Kathi will clone it into the Configuration (CNV) and Test (TST) environments. Functional team members will be using the CNV environment to build, in a particular order because of dependences, the tables (there are more than 400 of them, some already built by CMS) that will be used by the SDSU processes, which will also be prototyped in Configuration. The TST environment will be available to functional team members as a sandbox/playground. TST will be refreshed regularly from CNV to reflect progress made in CNV.

We will always keep a clean copy of SYS.

Meanwhile the Stage (STG) database, which is a CMS demonstration database containing dummy data and some extra values, will be cloned into the Development (DVL) and Training (TRN) environments. The dummy data in STG/DVL/TRN would skew any configuration work done by functional team members but are needed by the technical team members as they work on data conversion and interfaces. This work will be done in DVL. When the technical team has completed a particular piece, they will notify the appropriate functional team member(s), who will then test that piece in the TRN environment. Once the functional team member(s) have signed off that that particular interface or other piece of work is right, the piece will be navigated into CNV.

Until SYS is actually received, functional team members can be creating the values they need for the tables in spreadsheets, which can then be loaded into CNV by the technical team members. Once CNV is up and running, values can be added manually on-line. Functional team members should learn how to add the values manually so that they will be able to do so down the road.

When enough SDSU configuration work has been done in CNV, we will recreate STG (a SYS shell with CNV configuration but with no data). The new STG (aka Seed or SDSU pristine) will be used to refresh DVL and TRN and to clone a new TST, which will now be used to test against SDSU data.

The testing phase should reflect real life in that everyone should be testing in the same environment. It will be necessary from time to time for others to get out of the environment in order for a particular process (e.g., payroll) to be tested. Each level of testing (Integration, System, User Acceptance) will begin with a fresh clone from STG/Seed.

Security is controlled by role and permission lists, which are created by the end of the Configuration phase and added to STG/Seed. Veer is currently working on the security plan.

User accounts are created after Integration Testing, which is done with pseudo-users. User accounts are then migrated into Production (PRD).

Technical Team Update: Ralph reported that the technical team is working on conversions. All employees have been loaded into DVL. Of the 5100 employees, only 7 had PIMS code issues. TRN is open for testing; locations have been entered. Functional team members should be looking at the data clusters they are responsible for to make sure data elements are in the correct fields and that they look as they should. Department information will be added later (at this point all employees are in a single department) and departments will be associated with locations.

Fit/Gap Open Issues: Pat asked for the current status of each fit/gap document:

- Jennifer reported that the HR and Workforce Admin documents are complete.
- Ben reported that the Position Management document needs a little more updating and will be ready by end-of-day Thursday.
- Jill reported that the Workforce Development document needs updating on one issue and that it will be complete later today.
- Carol reported that the Recruiting document still has some outstanding issues but will be ready by end-of-day Thursday.
- Judi reported that the Benefits and Time and Labor documents are completed.
- Sheryll reported that the LCD document is completed.

Pat will be taking the documents as of Friday, March 3, to move the open issues to the Issues Log. After Friday, any activity on issues will be tracked in the Issues Log; no further changes should be made to the fit/gap documents.

White Papers: Jennifer, Carol, Peggy, and Stefania have been meeting every morning on the three white papers. Draft versions of the departmental user interface paper and

the centralized/decentralized paper are completed and will be placed on the shared drive by tomorrow. The goal is to forward all three to Cyndie and Pat by the end of the week. After Cyndie and Pat have reviewed them, presentations to the Team Leads will be scheduled.

Role-Level Security: Sydney raised the following concern: If the President's Office is at the top of the organization with all other departments under it in terms of security, could someone from the President's Office change employee data for employees in other departments? Answer: That situation is circumvented by a combination of role-level security (what information a person can see and what he/she can do with what is seen) and department security (whose information a person can see).

Other Items:

Conversion Issues: Judi reported on two data conversion issues. (1) Regarding visa information, two fields will be converted—visa type and expiration date. Z and some other type visas do not have expiration dates, so the converted data will show zeros. While it is necessary for an expiration date to be entered for each such employee, the relevant expiration date comes from the I20 or other authorization to work document, not from the actual visa. (2) We plan to download medical benefit dependent data from ACES, but ACES will only allow two downloads. The first will be scheduled for early May, with HR personnel maintaining the data manually from that point until Go Live.

Locations and Mail Codes: The mail code data available in Oracle is not dependable. David Del Rio in Mail Services will be contacted for more current information.

Data Center Access: Cyndie has requested accounts for anyone who might want to have a third-party reporting tool on his/her desktop. Those who want to make use of this will need to have a VPN client on their desktops and static IP addresses. However, Data Center constraints require that only one VPN client be running on a desktop at a time. If one is already running a VPN client, it will have to be turned off before the Data Center can be accessed.

Training: Jennifer will be attending Security training next week. Cyndie is scheduled for the same training during the first week of April.

Week of March 13: The following folks will be attending HEUG: Cindy, Carol, Sheryll, John K., Lorretta, Dana, Ralph, Jill, Jennifer, and Cyndie. As for the consultants, neither Peggy nor Michael will be on campus that week; Pat, Stefania, and Veer are scheduled to work Tuesday through Friday. Janet H. will be on vacation.

Technical Support: If you encounter an error message while working in the PeopleSoft environments, you should contact your functional consultant. If your consultant is not available, contact Veer. Veer will be the one to report to PeopleSoft those technical concerns that cannot be immediately resolved.

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COMR Process: Cyndie plans to schedule a walk-through of the process for submitting a Campus Object Migration Request (COMR), something that will be needed for each modification and custom report. It is expected that a functional team lead and a technical team member would work together to prepare the COMR and then route it to Cyndie, who would in turn submit it to CMS Central.

Next Week's Agenda: The Configuration Calendar will be a topic on next week's agenda.