

HCM Implementation Team
Meeting Notes
1 p.m., March 7, 2006, AD-231

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

Absent: Delgado, Venter

Fit/Gap Document Status Update: Pat has assembled all of the outstanding issues from the individual fit/gap documents into a single document that will become the Issues Log (in an Excel spreadsheet). The Issues Log should be available for distribution by the end of next week. He has moved the fit/gap documents themselves to the Project Management/Deliverables/Fit Gap Documents folder on kanga.

Fit/Gap Solution Template. Ralph distributed a template for documenting fit/gap solutions and reviewed its various sections. Because these documents will serve as the reference documentation in the future for all modifications, interfaces, and reports, they should be as detailed as possible, including instructions from the functional folks to the technical folks about just what needs to be tested and how.

Before this document is completed for an actual modification (not a report or interface), the modification must be approved by either the Executive Sponsor (Ellene) or the Steering Committee. The approval process begins with a recommendation for a modification from the appropriate functional and technical team members in the form of a Project Team Recommendation (PTR). Preparing this recommendation should take only a few hours and should include (1) the costs of not going forward with the modification, (2) details of the ideal modification, and (3) details of what level of modification we can live with. Once approved, the modification goes into the queue for the Project Plan and the functional and technical folks involved will begin writing the Fit/Gap Solution document.

A PTR is not needed for reports or interfaces. The general plan for handling reports is (1) to gather a listing of existing reports, (2) to map those reports to what is available in the new system's delivered reports and queries, and (3) to submit COMRs for the needed reports that cannot be accommodated by the new system. Security definition should be included in all report definitions. A discussion among the module functional lead, the technical team member involved, Jennifer, and Veer will precede the preparation of each COMR. The COMR will then be submitted to Cyndie for approval and, when approved, forwarded to CMS Central.

Technical Team Update: Ralph reported that locations and employees (faculty, staff, and students) have been loaded into TRN. David is working on faculty honors and awards. William is working on departments. There have been some difficulties with position data. A staging table is needed to associate a particular person with a particular position. Sheryll suggested that we begin with a subset of positions (e.g., just the College of Business Administration). A meeting has been scheduled for tomorrow to work on how position data will be handled.

Environment Management: A revised drawing of the SDSU database environments was distributed. CMS will be sending us another database, HSDPRJ, which will have just core PeopleSoft and only the CMS configuration needed to begin. The worst case scenario is that HSDPRJ is not received until Friday, with Kathi cloning it to CNV on Monday. Then Nyla will set up accounts in CNV and CNV will be cloned into TST. Veer and Stefania will then have Tuesday and Wednesday to validate the set up.

As configuration is built, TST will be cloned from CNV on a regular basis. The developers will remain working in DVL, which contains dummy data. Functional team members will log into TRN to test what the developers have done.

White Papers: Copies of the three white papers were distributed and discussed. All three papers will be taken to the Steering Committee.

Centralized/Decentralized: The main centralized/decentralized issue is who will establish, maintain, view, and report on person and job (assignment) data in the PeopleSoft HR system. The report focuses on the Workforce Admin module because it encompasses core processes that impact all other modules. The recommendation is to phase in decentralization by role with employee self-service being implemented immediately for basic transactions and manager self-service used to view employee data and to phase in decentralization by transaction for online data maintenance starting immediately with visa data and possibly decentralize student hires using the CSU simplified hire process. Which bits of employee or manager self-service that will be available will be determined by results of the module fit/gaps. The issue of increased staffing was specifically not addressed in this report because increased staffing will be needed regardless of whether a centralized or decentralized model is put in place. It is just a matter of where the staff will be placed—in HR or in the departments.

Department User Interface (DUI): Making the assumption that SDSU is leaning toward some degree of centralization, the DUI report recommends implementing a centralized processing model as an interim solution until it is possible to collect requirements and detailed cost information and to develop a custom solution specific to SDSU needs. As part of the Workforce Admin business process review, the current STF and ATF forms will be combined into a single form that speaks the PeopleSoft language and whose design mirrors the order in which PeopleSoft fields will be entered. Judi pointed out that Payroll will probably still need to see this source document to make sure that PPT codes are entered correctly.

Imaging: Regarding the Markview 170 imaging system, the recommendation is that SDSU retain the existing 170 processes without modification and create new processes where adjustments are necessary to integrate 170 with PeopleSoft HCM 8.9. A meeting with representatives from Markview to discuss this is scheduled for March 20.

Security for New Data Center: Cyndie distributed a spreadsheet showing what levels of user access to the new Data Center have been requested and for whom. She sent the request to CMS last night. She requested Database User status for the functional team leads in case they want to make use of a sqlnet connection to use a third-party reporting product. CMS will be sending instructions for the installation of the VPN client necessary for that connection.

Timeline Update: Pat and Cyndie are in the process of reworking the timeline in light of the delayed delivery of the database from CMS. Some buffer time had been built into Integration Testing and System Testing. Future risks to the timeline include a possible delay in delivery of baseline and a possible delay in delivery of the PRD database. Any other risks known to team members (such as the SCO mid-May deadline) should be conveyed to Pat as soon as possible.

CMS Baseline Delivery Workshops: Folks who want to attend all or part of the CMS Baseline Delivery Workshops to be offered May 23 to 25 should let Cyndie know as soon as possible. These workshops will not be videotaped. A HUG in-person meeting will probably be scheduled for May 23 in conjunction with these workshops. Eleanor Roberts at CMS Central will look into the possibility of a one-day registration fee.

Other Items:

Communication Plan: Cyndie asked team members to send her information that could be used on the HCM website and as the basis for an article in the SDSUniverse.

Conversion Issue: Stefania pointed out that when data clusters are ready for validating, the person whom the module team lead has assigned to do the testing may be someone other than a team member, someone not trained in navigating in PeopleSoft.