



HRMS 8.0 to 8.9 Upgrade

Project Scope Document

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DRAFT

REVISION CONTROL

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02/28/06	Melinda H Swank	Misc (suggested) additions, replaced Project Org with R&R	5, 6, 8, 9, 10, 11,12
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Review/Approval History

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Table of Contents

INTRODUCTION..... 4
1.0 Background.....4
2.0 CMS Project Office Sponsor.....4
3.0 Project Managers.....4
4.0 Project Mission4
PROJECT OBJECTIVES..... 5
PROJECT DELIVERABLES..... 6
PROJECT TIMELINE..... 7
MEASURES OF SUCCESS..... 8
SCOPE SUMMARY 9
RISK ASSESSMENT 10
OPEN ISSUES..... 12
ROLES AND RESPONSIBILITIES 13

INTRODUCTION

1.0 Background

This scope document defines the scope and goals of the work required to upgrade Humboldt State University's PeopleSoft Human Resources system from version 8.0 to 8.9. Included in that effort are plans for implementing Self Service, Benefits Administration, and Absence Management functionality.

2.0 CMS Project Office Sponsor

Paul M. Picciotta, CMS Project Director

3.0 Project Managers

Cindi Hunt
Sue Peck

4.0 Project Mission

The mission of this project is to ensure full utilization of the PeopleSoft HR "core functionality" delivered by the CO.

PROJECT OBJECTIVES

Increase Automation of Human Resources Business Processes

- Streamline inefficient business processes

Improve Utilization of “Core Functionality”

- Configure system for additional use

Improve Worker Productivity

- Reduce manual workloads through the use of technology
- Provide comprehensive training on software changes and new functionalities

Maintain Data Integrity in New Software Version

- Ensure data conversion successful and accurate

Positioning for Future Initiatives

- Integration with Finance 9.0
- Integration with Campus Solutions 8.9
- Integration with CRM

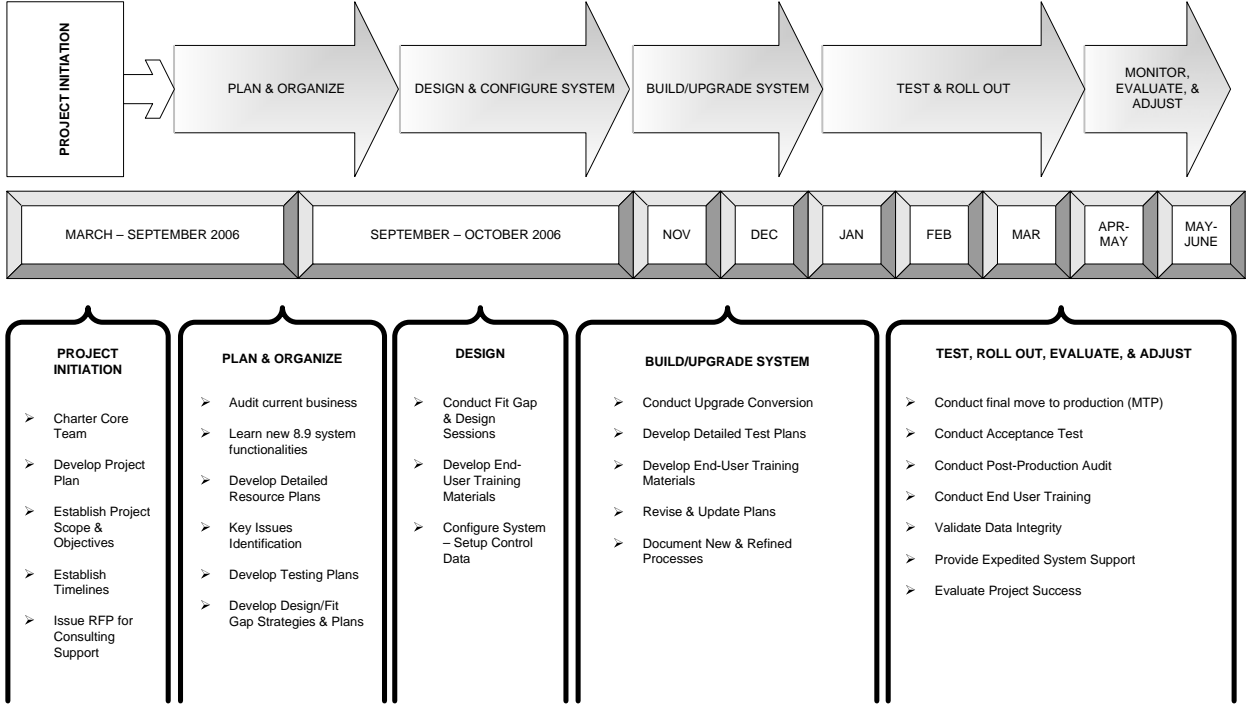
PROJECT DELIVERABLES

The deliverables from the project include the following:

- A system capable of full utilization of “core functionality”.
- Accurate and complete data conversion to new software version.
- Training plan that provides instruction on PeopleSoft aspects of all business processes utilizing the software.
- Refined business processes to better leverage the investment in PeopleSoft.
- An acceptance test process which includes end-user and division director sign-off.
- Completion of a fit/gap analysis.
- Implementation of HR Self Service, Benefits Administration, and Absence Management functionality.

PROJECT TIMELINE

Graphic One below shows the high level project tasks and phases and serves as a general guide toward target dates.



Graphic One: Project Timeline

MEASURES OF SUCCESS

This section establishes criteria for evaluating the success of the project. The criteria selected should be quantifiable and provide insight into the achievement of the goals outlined earlier in this document.

Table 1. Functional Drivers and Performance Measures

Functional Driver	Performance Measure
Conversion Data Integrity	No data loss: 100% of records are converted.
Improve User Knowledge and Use of System	Comprehensive training plans, reference materials and testing of end-users.
Coordination with Future Initiatives	Document evaluation of 8.9 influence on Finance / Campus Solution initiatives
Improve utilization of core functionality	Worker Productivity increased.

SCOPE SUMMARY

This section provides, in table format, a summary of in-scope and deferred tasks.

Table 3. Requirement Line Items

Upgrade Phase	Post Upgrade Phase
Upgrade 8.0 system to 8.9	
Implement all CMS Baseline 8.9 “Core Functionality”	
Implement 8.9 Self Service functionality	
Analyze non-core 8.9 functionality	
Integration with Finance	
Integration with SA / Campus Solutions	
Implement Workflow	Analyze for further deployment
	Implement Absence Management – date dependant upon delivery
	Implement Benefits Administration – date dependant upon delivery
	SCO 21 st Century timeline TBD; no impact on 8.9 Upgrade

RISK ASSESSMENT

Project Risks	Likelihood (1-5)	Impact (1-5)	Mitigation Strategy & Contingency Plan(s)
Ability to dedicate time to project	3	5	<p>Complete resource plan, back-fill as appropriate.</p> <p>[06/12/06 PMP – a detailed resource plan has been developed by the Project Managers (M.Swank,C.Hunt,S.Peck) and will be further reviewed with I/o Consulting, our upgrade partner.]</p>
Ability to complete fit/gap analysis to fully identify opportunities	3	3	<p>Complete resource plan, back-fill as appropriate. Engage consultants to assist in evaluation and compilation of materials.</p> <p>[06/12/06 PMP – a detailed fit gap schedule is nearing completion. We have discussed one/a few very large sessions as a PR measure.] [6/30/06] – Fit gap schedule is complete and approved.</p>
Ability to complete training of end-user staff	3	5	<p>Complete resource plan, back-fill as appropriate. Engage consultants to assist in development of training materials, conducting training sessions.</p> <p>[06/12/06 PMP – initial training plans have been executed; additional training will be conducted by our upgrade vendor (I/o Consulting) as part of fit gap sessions; in addition, a dedicated, full time trainer job search is well under way with several promising applications.]</p>
Undetected errors during data validation and testing process	2	3	<p>Create multi-layered test scripts, highlighting critical fields to be validated. Create a dual-control validation process for critical items.</p>
Delays in delivery of technical upgrade steps by central office	4	5	<p>Create contingency plans; do we have alternate go-live dates?</p> <p>[06/12/06 PMP – several delays have occurred; contingencies have been utilized and new ones must once again be developed.]</p>

OPEN ISSUES

This section lists items for which scope decisions are undecided. For each undecided item, a subsequent review date will be specified. At that date, the issue will be reviewed and a plan of action decided upon.

Table 2. Undecided Scope Line Items (Undecided scope items are listed in the order they should be addressed for possible implementation).

Priority	Issue	Plan for Resolution
High	No visit date set from CMS Central	2/28/06 – Paul contacted SOSS Director

ROLES AND RESPONSIBILITIES**Role: Project Manager****Responsibilities:**

- Ensure progress along critical path and toward objectives of the Project.
- Coordinate project meetings with functional leads and other appropriate staff.
- Facilitate the meetings by providing agendas, meeting notes, and guiding meeting discussions.
- Track, report on, and maintain the implementation project plan, including:
 - Coordinate audit of current business
 - Coordinate education of new 8.9 system functionality.
 - Coordinate identification of key issues
 - Coordinate development of resource plans
 - Coordinate fit gap and design sessions and associated project tasks.
 - Coordinate development of training materials and end-user training.
 - Coordinate development of testing plans and user-testing sessions.
 - Track, report on, and maintain detailed issues log.
- Coordinate major milestones and key project deliverables, such as the implementation RFP.
- Coordinate final move to production and acceptance testing.
- Coordinate Post-Production Audit and evaluation of project success.
- Be a strong advocate for the project.