Core-CT

Project Briefing

12/20/2011

Opening Comments

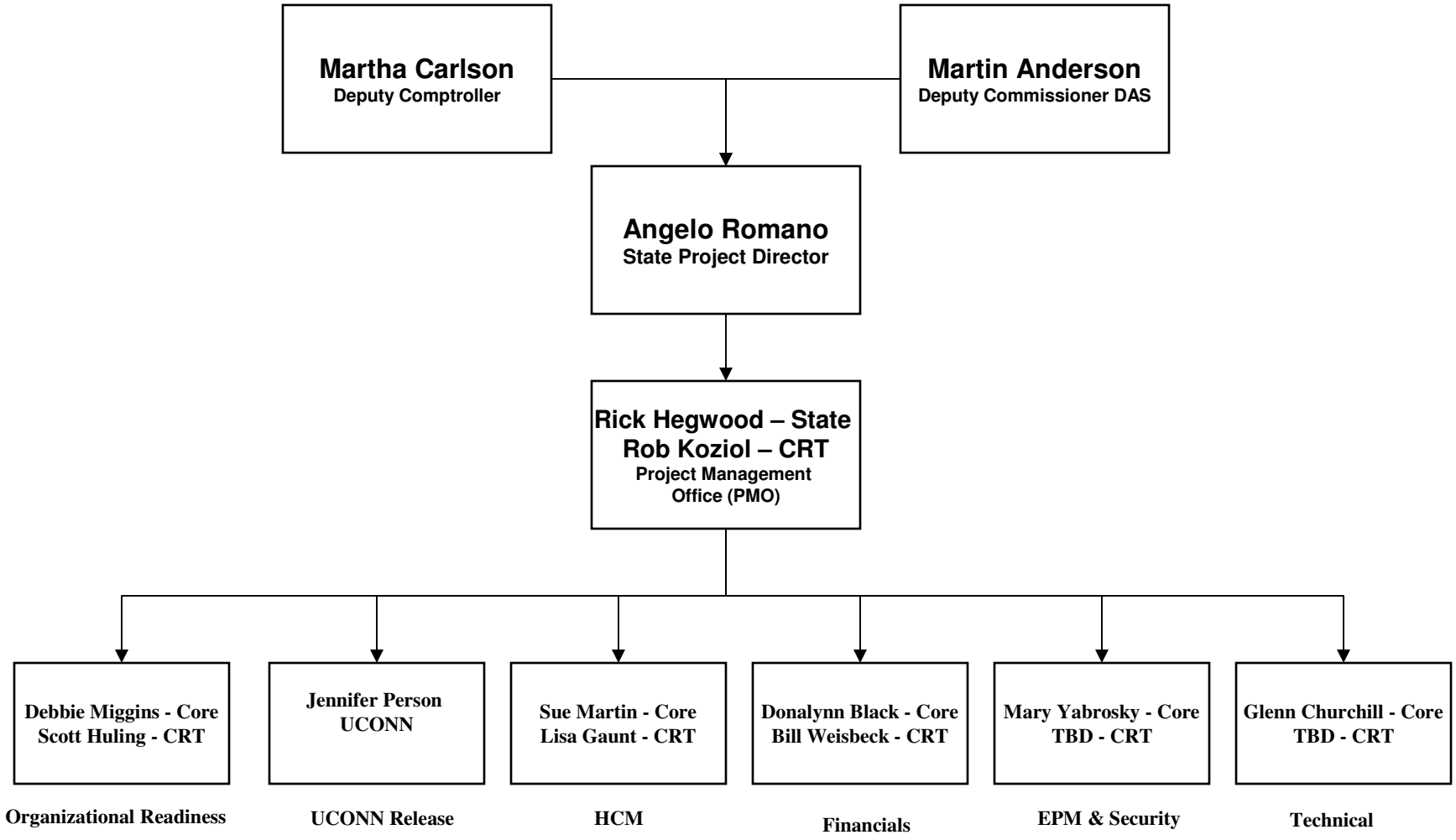
Topic	Presenter
➢ Welcome and Agenda	Angelo Romano
➢ Project Goals & Scope	Angelo Romano
➢ Modules Overview	
➢ HRMS	Sue Martin
➢ UCONN Release	Jen Person
➢ Financials	Donalynn Black
➢ EPM/ OBIEE/ Security	Mary Yabrosky
➢ Technology	Glenn Churchill
➢ Organizational Readiness	Debbie Miggins
➢ Project Methodology	Rob Koziol
➢ Question & Answer Session	Debbie Miggins

Core-CT Upgrade Project Goal

The goal of the project is to enhance the productivity of the State by :

- ❑ **Upgrading existing Core-CT PeopleSoft product suites to Release 9.1**
- ❑ **Provide end user self service functionality**
- ❑ **Fully integrate Pension Payroll into the Core-CT HCM environment**
- ❑ **Implement UConn into the Core-CT HCM environment**
- ❑ **Provide Bank and Vendor integration**
- ❑ **Implement Punchout capabilities**
- ❑ **Conduct a Fit/Gap Analysis of the new Oracle EPM & Business intelligence Enterprise Edition (OBIEE) tool to determine long term CT reporting strategy**

Core-CT Upgrade Project Management Org Chart

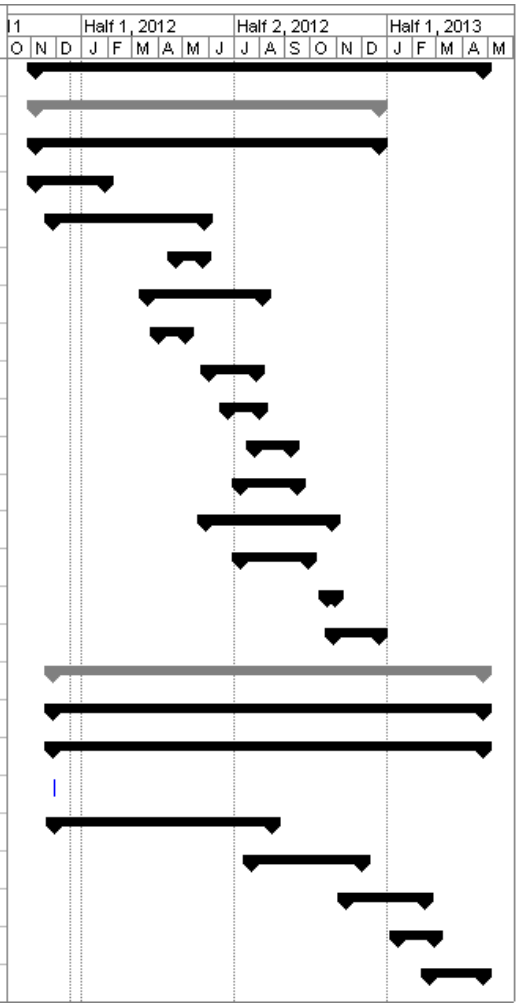


Core-CT Upgrade Project Scope

1. **HRMS**
   - Upgrade from PeopleSoft 8.9 to 9.1
   - New Functionality within ePay, eProfile, eBenefits, Talent Acquisition Management / Candidate Gateway
   - Implement Retirement Payroll fully into Core-CT HCM
   - Implement UConn HCM functions into Core-CT HCM
2. **Financials**
   - Upgrade from PeopleSoft 8.9 to 9.1
   - Implement Direct Connect
   - Implement P-Card
3. **EPM/ Oracle Business Intelligence Enterprise Edition (OBIEE)**
   - Upgrade EPM from PeopleSoft 9.0 to 9.1
   - Perform Fit/ Gap analysis on Oracle's upcoming new EPM/ OBIEE tool
4. **Portal Security**
   - Re-implement enterprise portal on version 9.1
   - Security Automation
5. **Technology**
   - Tools Upgrade from PeopleTools 8.49 to 8.51
   - Oracle Database Upgrade from 11gR1 to 11gR2+

Integrated Project Timeline

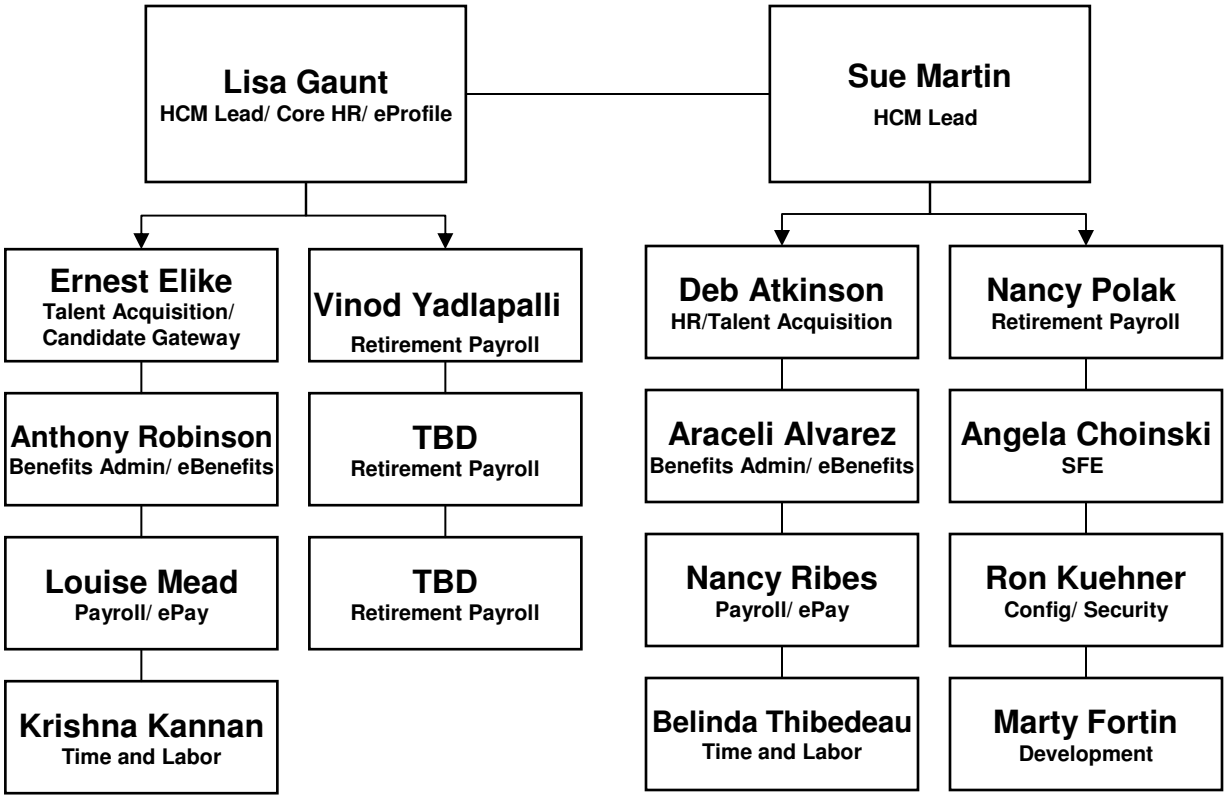
Task Name	Start	Finish
Core-CT Upgrade to version 9.1	Mon 11/7/11	Fri 4/26/13
State of Connecticut_HCM_RPS_Project Plan	Mon 11/7/11	Fri 12/21/12
Connecticut OSC PeopleSoft HCM Upgrade	Mon 11/7/11	Fri 12/21/12
Stage I - Initiation	Mon 11/7/11	Fri 1/27/12
Initial Pass	Mon 11/28/11	Fri 5/25/12
Performance Testing Plan	Mon 4/23/12	Thu 5/24/12
Training Planning	Mon 3/19/12	Fri 8/3/12
Test Plan	Mon 4/2/12	Fri 5/4/12
Test Move 1 & Integration Testing	Fri 6/1/12	Fri 7/27/12
Test Move 2 & Performance Testing	Mon 6/25/12	Tue 7/31/12
Test Move 3 & User Acceptance Testing	Fri 7/27/12	Fri 9/7/12
Finalize HCM Documentation	Mon 7/9/12	Fri 9/14/12
Training	Mon 5/28/12	Fri 10/26/12
Deployment Plan	Mon 7/9/12	Fri 9/28/12
Deployment	Mon 10/22/12	Mon 10/29/12
Production Support	Mon 10/29/12	Fri 12/21/12
State of Connecticut_Initial Project Plan	Mon 11/28/11	Fri 4/26/13
Connecticut OSC PeopleSoft FSM Upgrade Project	Mon 11/28/11	Fri 4/26/13
Upgrade	Mon 11/28/11	Fri 4/26/13
Stage I - Project initiation	Mon 11/28/11	Mon 11/28/11
Initial Pass	Tue 11/29/11	Wed 8/15/12
Test Move 1	Mon 7/23/12	Fri 11/30/12
Test Move 2	Tue 11/13/12	Fri 2/15/13
Test Move 3	Tue 1/15/13	Mon 2/25/13
Deployment & Support	Thu 2/21/13	Fri 4/26/13



Sue Martin
HCM Team

Core-CT Upgrade Project HCM Org Chart

HCM



Upgraded Core-CT Functionality

- **Core HR**
  - Template-based Hires
  - Improved I-9 reporting/printing
  - Improved Mass Update functionality

- **Benefits Administration**
  - Improved Rate Table Structure
  - New Simple Rate Plans
  - Improved Calculation Rules Component

- **Payroll**
  - Updated Paysheet Load Process
  - Enhancements to Retro Pay
  - Better Chartfield Integration

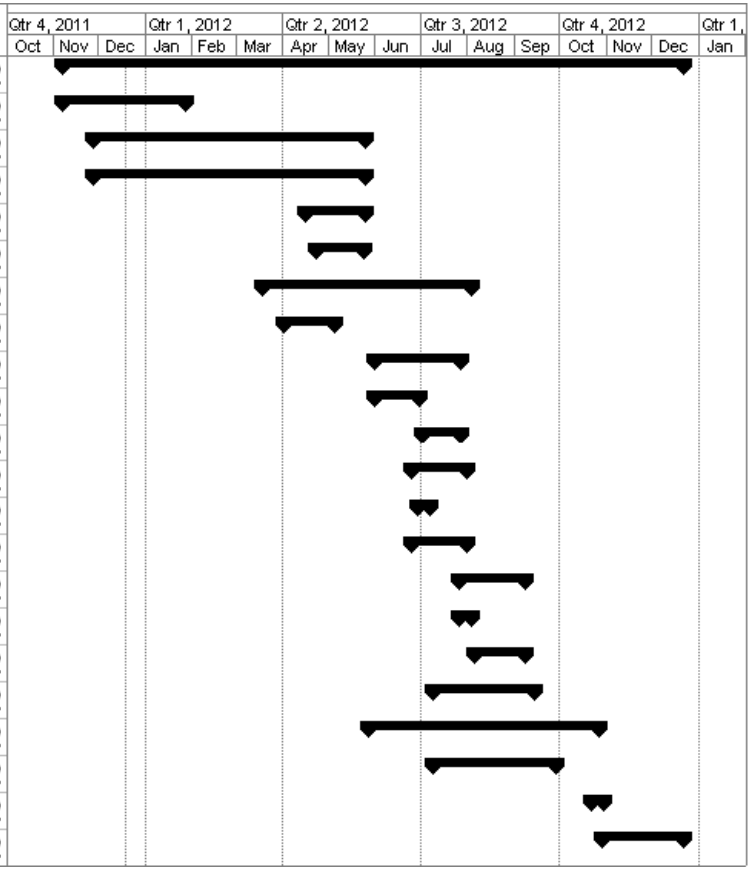
- **Time and Labor**
  - Improved Timesheet Functionality
  - Greater Synchronization and Integration Between HCM and Financials
  - Enhanced Time and Labor and Payroll Integration

New Functionality

- Talent Acquisition Management/ Candidate Gateway
  - Improved Interview Scheduling
  - Expanded Applicant Screening Capabilities
  - Tighter integration with Profile Manager
- Retirement Payroll
  - One source system for employee and retiree data
  - Maximizes the PeopleSoft integration
  - Increases reporting capabilities
- E-Apps
  - ePay
  - eBenefits
  - eProfile
  - Expansion of Self Service Time & Labor

HCM Timeline

ID	Task Name	Start	Finish
1	Connecticut OSC PeopleSoft HCM Upgrade	Mon 11/7/11	Fri 12/21/12
2	Stage I - Initiation	Mon 11/7/11	Fri 1/27/12
43	Initial Pass	Mon 11/28/11	Fri 5/25/12
44	Initial Pass Upgrade	Mon 11/28/11	Fri 5/25/12
412	Initial Pass Testing	Mon 4/16/12	Fri 5/25/12
416	Performance Testing Plan	Mon 4/23/12	Thu 5/24/12
425	Training Planning	Mon 3/19/12	Fri 8/3/12
447	Test Plan	Mon 4/2/12	Fri 5/4/12
454	Test Move 1 & Integration Testing	Fri 6/1/12	Fri 7/27/12
455	Test Move 1 Upgrade	Fri 6/1/12	Fri 6/29/12
464	Test Move 1 Testing	Mon 7/2/12	Fri 7/27/12
467	Test Move 2 & Performance Testing	Mon 6/25/12	Tue 7/31/12
468	Test Move 2 Upgrade	Fri 6/29/12	Fri 7/6/12
471	Test Move 2 Testing	Mon 6/25/12	Tue 7/31/12
480	Test Move 3 & User Acceptance Testing	Fri 7/27/12	Fri 9/7/12
481	Test Move 3 Upgrade	Fri 7/27/12	Fri 8/3/12
484	Test Move 3 Testing	Mon 8/6/12	Fri 9/7/12
487	Finalize HCM Documentation	Mon 7/9/12	Fri 9/14/12
537	Training	Mon 5/28/12	Fri 10/26/12
547	Deployment Plan	Mon 7/9/12	Fri 9/28/12
549	Deployment	Mon 10/22/12	Mon 10/29/12
551	Production Support	Mon 10/29/12	Fri 12/21/12



Jennifer Person

UCONN Release

UConn Project Staff Currently On Site

Jennifer Person – UConn Principle Project Lead
Deepesh Chugh – Oracle Project Manager
Angie Wisniewski – UConn Project Manager

Functional Leads:

- **Renee Boggis** – Recruiting Solutions Lead
- **Jennifer Traynor** & **Jessica Dempsey** – HR Co-Leads
- **Gil Milone** – T&L Lead
- **Amy Tse** – Payroll Lead
- **Seth Jodoin** – Security Lead

Technical Leads:

- **Enrique Miras-Alonso** – Recruiting Solutions and HR Lead
- **Rob Rowland** – T&L and Payroll Lead

Previous UConn HCM 9.1 Accomplishments

- Functional and Technical Training for Leads and SMEs
- Project Management Deliverables
  - Project Plan
  - Governance Strategy
  - Change Management Strategy
  - Risk and Issue Management Strategy
  - Test Plan
  - Training Plan
- Requirements Gathering
- Fit Gap
  - Business Process Reenginering
  - Proof of Concept / Prototyping
- Configuration
- Conversion
- Security

UConn HCM Modules/Functionalities

- Recruiting Solutions (CG and TAM)
- HR
  - Profile Manager
  - SmartHire (Integration between Recruiting and HR)
  - Integration between PeopleSoft SA and HCM
- eCompensation Desktop Manager
- E-Apps (Self Service)
  - eBenefits
  - ePay
  - eProfile
  - Time & Labor, Absence Management
- Absence Management
- Time & Labor
- Payroll
- Application Workflow Engine (AWE)

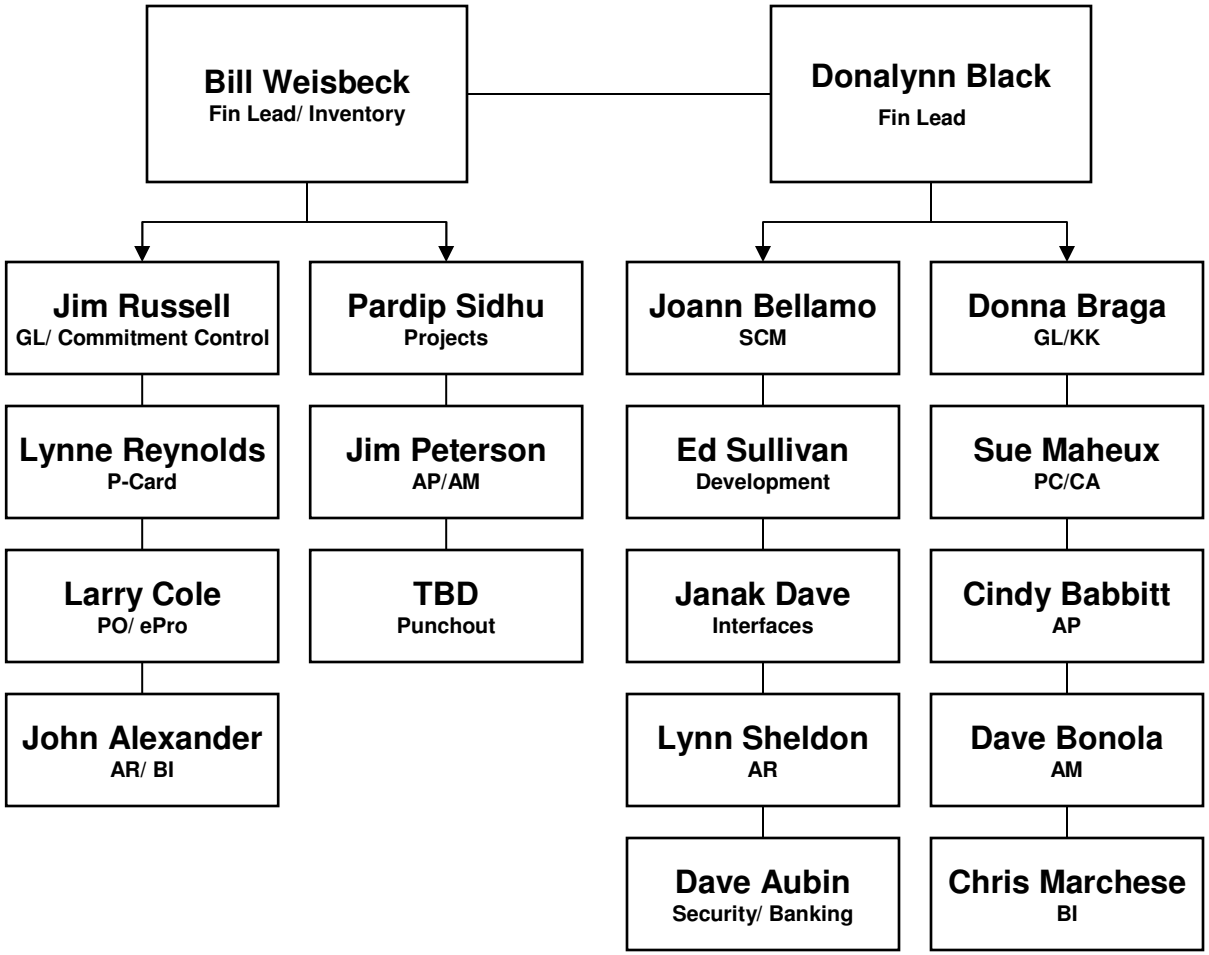
UConn Project Activities, Recent & Upcoming

- Participated in Upgrade Requirements Gathering Sessions
- Participation in Upgrade Fit Gap Sessions in January
- Development of UConn Release Project Plan/Timeline and Implementation Strategy
- Arrival of Additional Project Team Members beginning in January
- Finalize Workspace Assignments and Logistics
- Initiate UConn-Specific Fit Gap to Core-CT

Donalynn Black
Financials Team

Core-CT Upgrade Project Org Chart

Financials



NEW FUNCTIONALITY to be Implemented:

❑ ePro/Purchasing

- **P-Card Implementation**
  - Online reconciliation of purchases.
  - Ability to denote on a requisition or PO that it will be paid with a P-Card.
  - Eliminate the need to create a transaction spreadsheet, provide ability to reuse data collected from the Bank's data file.
- **Punchout (Direct Connect) – Reviewing 3 vendors for punchout**
  - Link out to vendors' websites, select items in shopping cart, and bring items back to the requisition and go through regular approval process.
- **Improved Requisition maintenance and management**
  - The ability to perform several requisition processing functions on a single page reduces the number of navigation steps that are needed to perform a task and results in more streamlined transaction processing. Also provides enhanced visibility concerning budget and document status.
- **Added Embedded help for ePro requisitions**
  - These page-specific instructions can be tailored to provide additional help information and Connecticut's business process definitions.

NEW FUNCTIONALITY to be Implemented:

- **Budgeting/ Commitment Control**
  - **Budget Pre-Check on subsystem transactions -** Budget checking without reserving money.
  - **Copy Budget Definitions -** Creates budget definitions, ledger groups and detail ledgers.

- **Accounts Payable**
  - **Enhanced Voucher processing -** Several enhancements to increase productivity and efficiency.
  - **Enhanced withholding process -** process was simplified and streamlined.

- **Asset Management**
  - **Receiver Push** – Ability to push asset information when the receiver is entered as a pending status asset. Once the asset is paid the status is changed to be in-service.

UPGRADED FUNCTIONALITY Under Assessment:

❑ All Modules

- **Approval Framework** – Use of the approval framework requires less technical skills to maintain and allows greater functionally to adjust for changes in the business process.
- **Attachments** – Use of attachments for greater efficiency in workflow.
- **Audit trails –** Several modules now have audit trails available and an assessment of what information is available in the audit will be done.

❑ Accounts Payable

- **Electronic Invoicing** – To improve both productivity and efficiency.
- **Digital signature process** - Can be used for sending and receiving invoices. The application provides an option for the vendor to digitally sign an invoice
- **PO Voucher Excel Upload** – Ability to upload in spreadsheet form PO vouchers and allows agencies to upload vouchers without technical assistance.

UPGRADED FUNCTIONALITY Under Assessment:

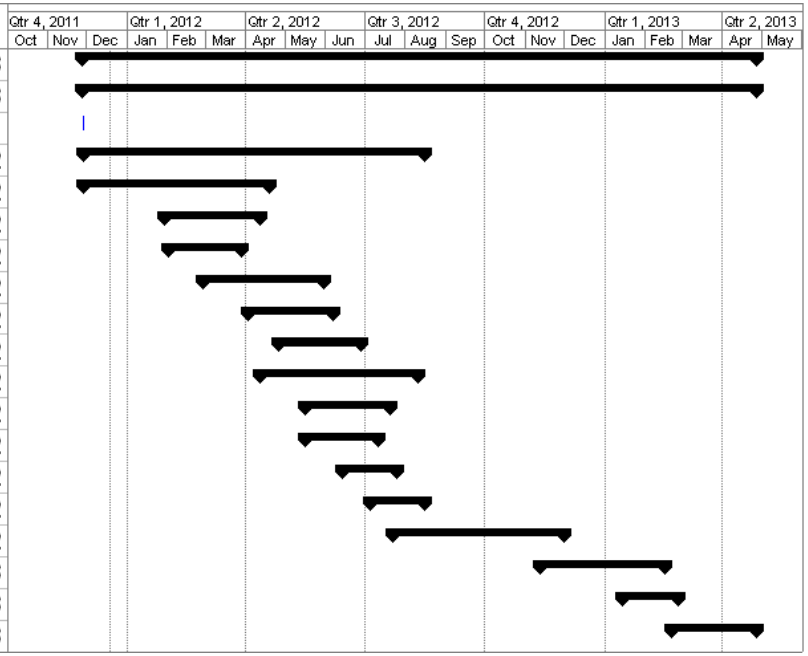
❑ Project Costing

- **Enhanced Project Data Compression and Archive Process** - Provides the ability to restore data that was previously compressed and to summarize project data into history tables. It will summarize transaction data based on run control parameters, such as date, analysis group or contract.

- **Feeder and Pricing Summarization** - Enables you to summarize subsystem and target pricing transactions before they are written to the project transaction table thereby reducing the number of rows in the project transaction table and improving system performance.

Financials Timeline

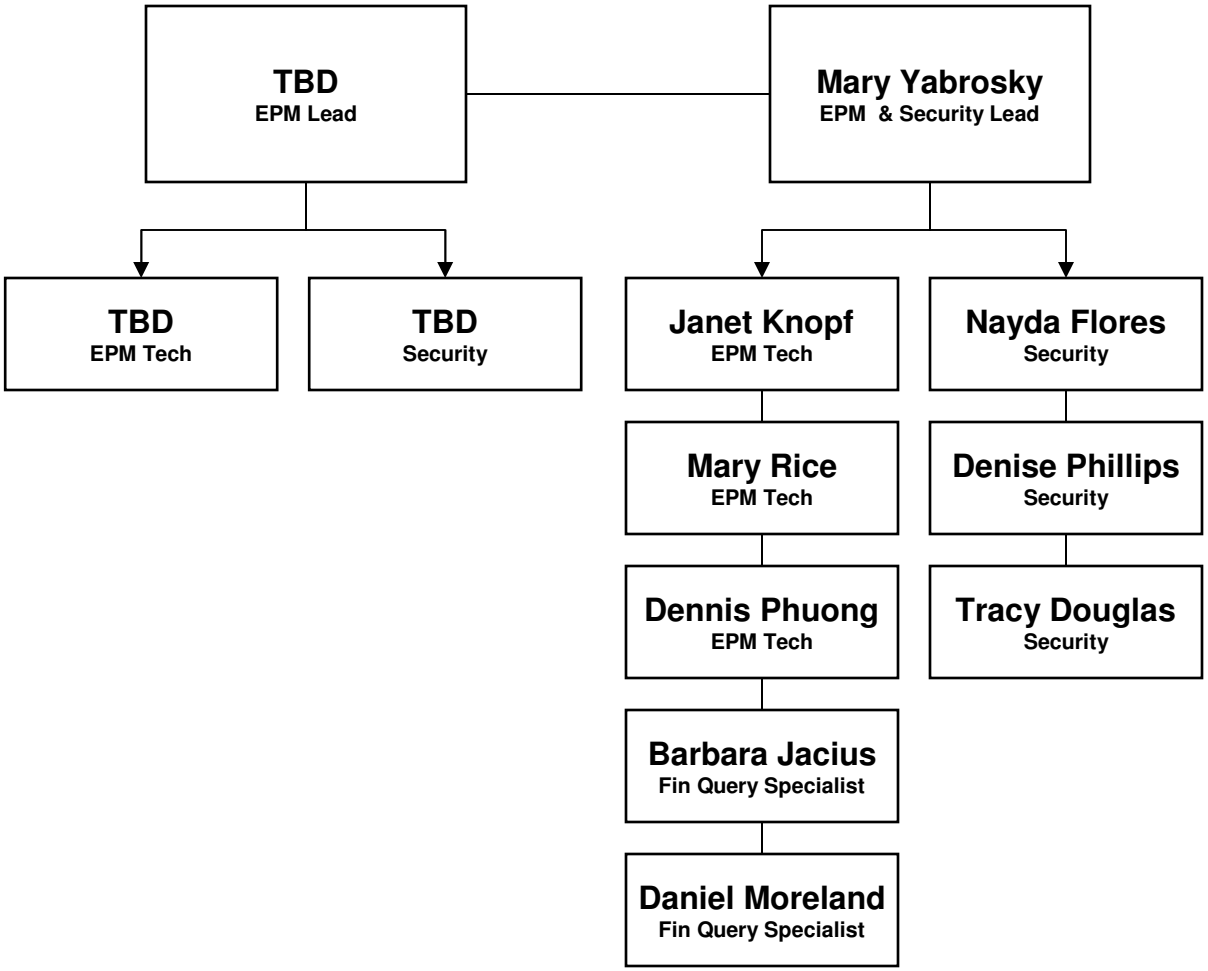
ID	Task Name	Start	Finish
1	**Connecticut OSC PeopleSoft FSM Upgrade Project**	**Mon 11/28/11**	**Fri 4/26/13**
2	**Upgrade**	**Mon 11/28/11**	**Fri 4/26/13**
3	Stage I - Project initiation	Mon 11/28/11	Mon 11/28/11
4	**Initial Pass**	**Tue 11/29/11**	**Wed 8/15/12**
5	**Upgrade Impact & Requirements Gathering**	**Tue 11/29/11**	**Wed 4/18/12**
29	**Initial Database Upgrade**	**Mon 1/30/12**	**Wed 4/11/12**
35	**Retrofit Analysis**	**Thu 2/2/12**	**Wed 3/28/12**
48	**Fit/Gap & Recommendations**	**Tue 2/28/12**	**Wed 5/30/12**
69	**Specifications (Updates & Creation)**	**Tue 4/3/12**	**Wed 6/6/12**
81	**Development & Retrofit**	**Thu 4/26/12**	**Wed 6/27/12**
86	**Configuration & Config Updates**	**Thu 4/12/12**	**Fri 8/10/12**
106	**Unit Testing**	**Thu 5/17/12**	**Fri 7/20/12**
119	**FSM Project scope**	**Thu 5/17/12**	**Wed 7/11/12**
122	**Project Plan Updated**	**Thu 6/14/12**	**Wed 7/25/12**
126	**Test Plan**	**Thu 7/5/12**	**Wed 8/15/12**
134	**Test Move 1**	**Mon 7/23/12**	**Fri 11/30/12**
153	**Test Move 2**	**Tue 11/13/12**	**Fri 2/15/13**
158	**Test Move 3**	**Tue 1/15/13**	**Mon 2/25/13**
169	**Deployment & Support**	**Thu 2/21/13**	**Fri 4/26/13**



Mary Yabrosky
EPM & Security Team

Core-CT Upgrade Project Org Chart

EPM & Security



EPM

❑ EPM Impacts from HRMS and Financial 9.1 upgrades

- Retrofit Existing or Add/Remove Reporting Tables
  - Changes to underlying HRMS & Financial tables
- New Reporting Subject areas
  - New Functionality (e-Recruit, Direct Connect)
  - New Participants (Uconn, OSC Retirement Division)

❑ Implement EPM 9.1/PTools 8.52 Upgrade

- Retrofit Custom ETLs/MVs for Custom Reporting Tables
- Review New Features for Enhancing PS Query Experience
  - Drilling URL capability
  - XML Publisher
  - Connected Query
- Retrofit / Enhance Core-CT Queries
- Will not be implementing 'Analytics' in EPM 9.1
- Go-live to coincide with Financial Upgrade – March 3, 2013

EPM

❑ PS EPM Release Update

- 9.1 -> Last Version of EPM 9.1
- Maintain Reporting Tables & PS Query in EPM 9.1
- Move OBIEE Implementation from PS EPM

❑ OBIEE

- Perform Fit Gap on OBIEE w/ HRMS, FIN 9.1 and Oracle's Enterprise Performance Management Warehouse
  - Reporting Requirements
  - Data & ETL Fit Gap
  - April thru June, 2012

Portal Security

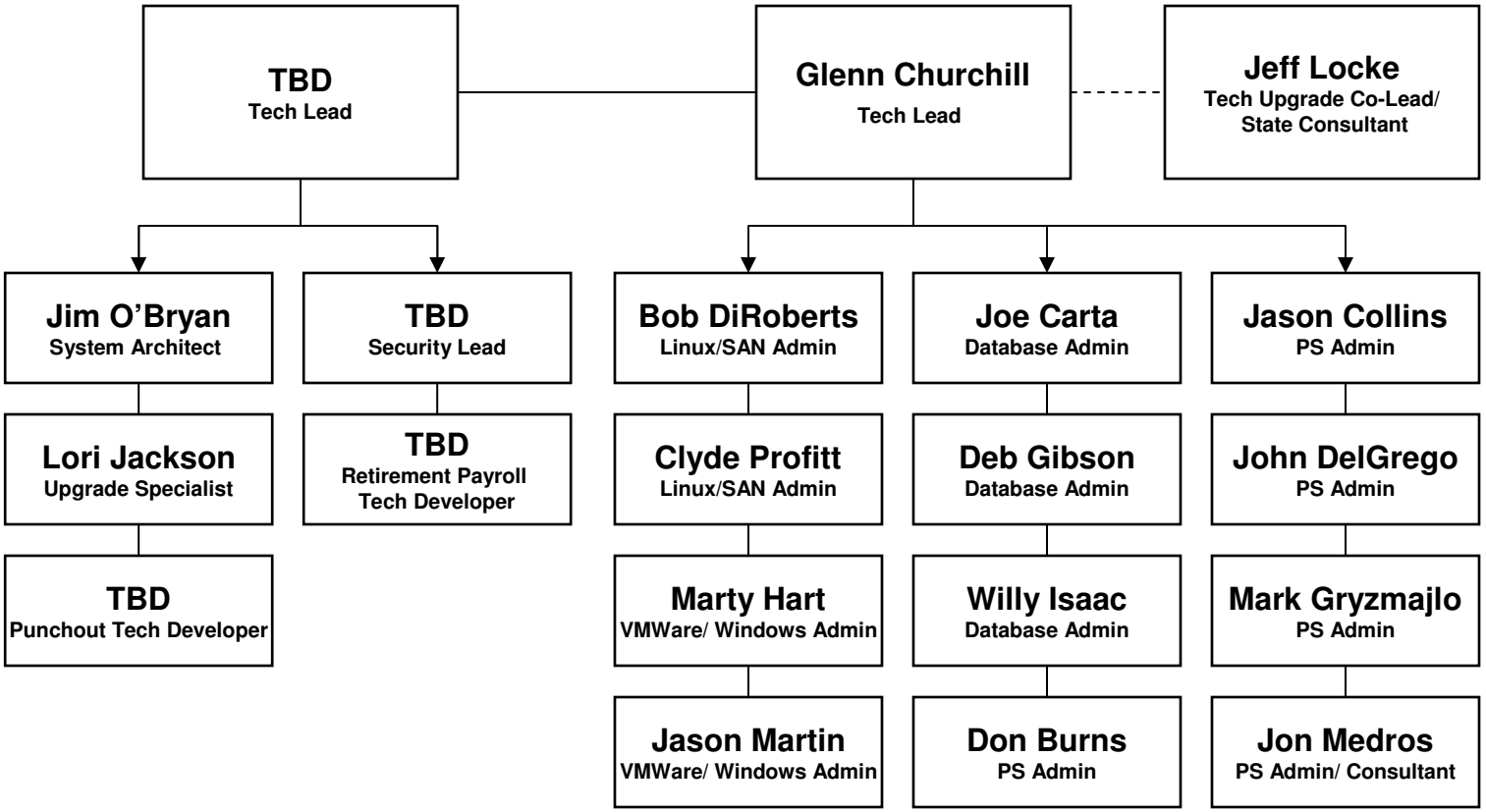
❑ Security Automation

- **Implement Solution to Automate the CO-1092 – Agency Security Request Form and Approval Process**
- **Integrate with HRMS Job Data for Account Activations/In-activations**
- **Work in Consideration of Self Service Users**
- **Initiate January, 2012**
- **Scope / Timeline TBD**

Glenn Churchill
Technology Team

Core-CT Upgrade Project Org Chart

Technical



Technology- PeopleTools Upgrade

- **Define PeopleTools - The Underlying Framework, Applications, Utilities and Code which Supports All PeopleSoft Modules.**
- **Currently Running PT8.49, Upgrading to PT8.51**
- **PT 8.5X Adds New Functionality and an Enhanced User Interface**
- **New Architecture**
  - **PT8.51 is Based on 64bit Server Operating Systems**
  - **Linux-64 and Windows 2008R2**
- **Plan to Separate The Tools Upgrade from Application Upgrade**
  - **Currently working with 8.51.13**
  - **We are Reviewing 8.52**
  - **Will Introduce 8.52 with the Financial 9.1 Application Upgrade**
  - **Expect - More Frequent PeopleTools Upgrades**

Technology- Tools &Third Party Software

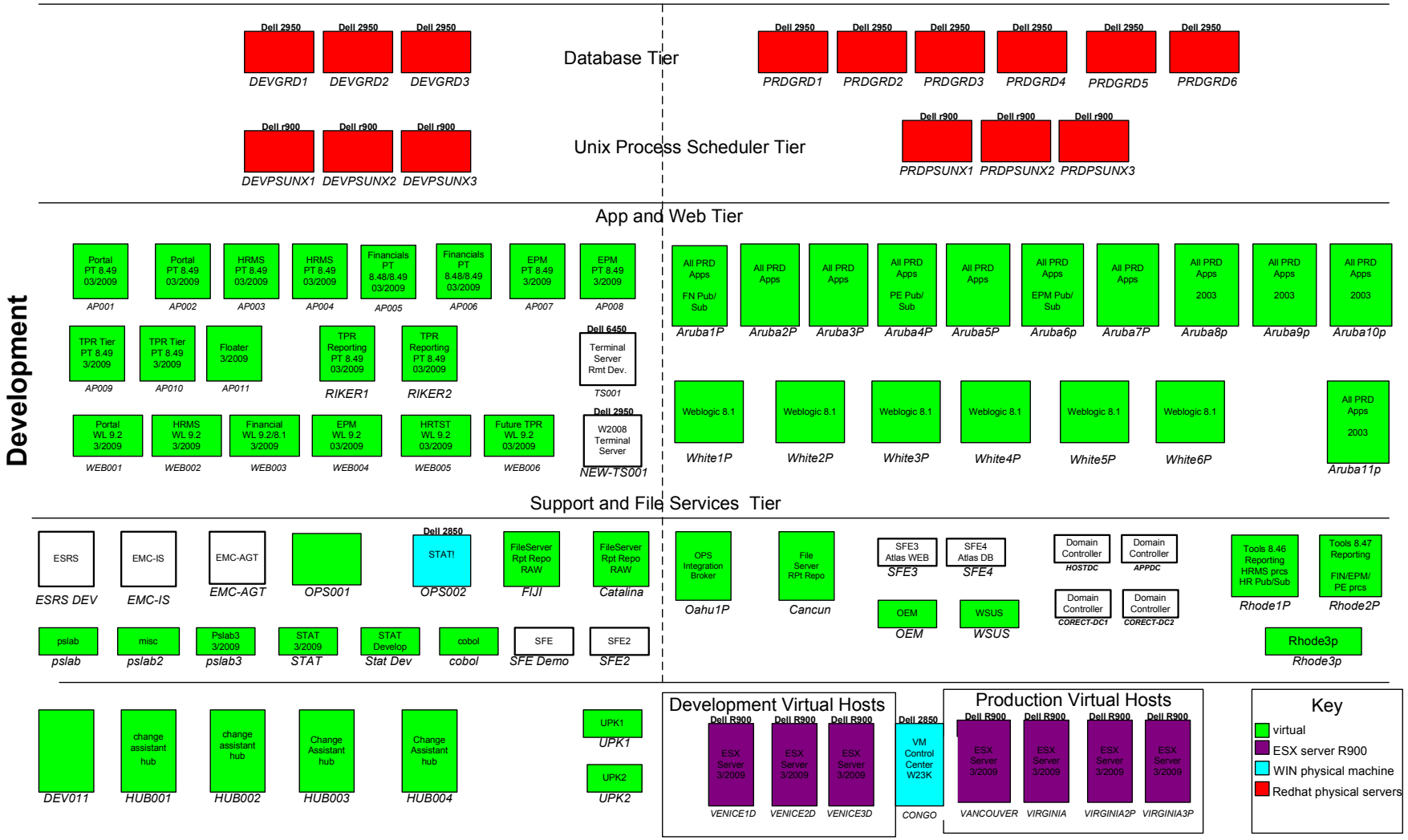
- **Web Servers**
  - **Oracle Linux 5**
  - **Weblogic 10.3**
  - **J-Rocket 1.6**
- **Application Servers**
  - **Oracle Linux 5**
  - **Tuxedo 10.3**
- **Process Schedulers**
  - **Oracle Linux 5 and Windows 2008R2**
  - **Crystal Reports 2008,**
  - **Cobol - Server Express 5.1**
  - **New Cybermation Agent**
- **STAT 5.5**
  - **New Server and Client Software**
- **VMWare – Core-CT's Virtualization Platform**
  - **ESXI 5**

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y
Peopletools 8.51 Upgrade Tasks	**Nov**				**Dec**				**Jan**			**Feb**				**Mar**				**Apr**				
PART 1 - PRELIMINARY ANALYSIS AND PROJECT PLANNING																								
ORGANIZE PROJECT / ORG READINESS																								
CREATE DEMO ENV W/PATCHES TO DETERMINE LOE																								
SOLIDIFY UPGRADE PROJECT PLAN																								
PART 2 - UPGRADE TO PEOPLETOOLS 8.51.13/TEST																								
PROJECT MANAGEMENT																								
UPGRADE DEMO DATABASES - CREATE xxDMO8 DBs AND UPGRADE TO 8.51.13																								
BUILD BREAK/FIX PATH FOR ALL 4 PRODUCTS																								
UPGRADE ALL OF THE TPR ENVIRONMENTS TO 8.51.13 AND INTEGRATE INTO PORTAL																								
(PETPR, FNTPR, HRTPR, EPTPR) CONDUCT FUNCTIONAL/TECHNICAL TESTING - 1st PASS																								
REFRESH ALL TPR ENVIRONMENTS AND PERFORM TOOLS UPGRADE TO 8.51.13																								
(PETPR, FNTPR, HRTPR, EPTPR) CONDUCT FUNCTIONAL/TECHNICAL TESTING - 2nd PASS																								
PRODUCTION 8.51.13 PEOPLETOOLS UPGRADES (PEPRD, FNPRD, HRPRD, EPPRD) (3/30/12-4/2/12)																								
USER TRAINING & COMMUNICATIONS																								
PART 3 - POST IMPLEMENTATION REVIEW AND SUPPORT																								
POST PRODUCTION SUPPORT																								

Technology- Oracle Database Upgrade

- Oracle RAC (Real Application Clusters) Implementation
- Currently Running 11gR1, Upgrading to 11gR2
- 11gR2 Will Run Under Oracle Linux 5
- New Oracle Module – Advanced Compression
- New Hardware
- 3 Node Development Cluster
- 6 Node Production Cluster
- Continue to Run DataGuard to Replicate Production Databases to UCONN

CORE-CT - PHYSICAL SERVER DETAILED DESIGN



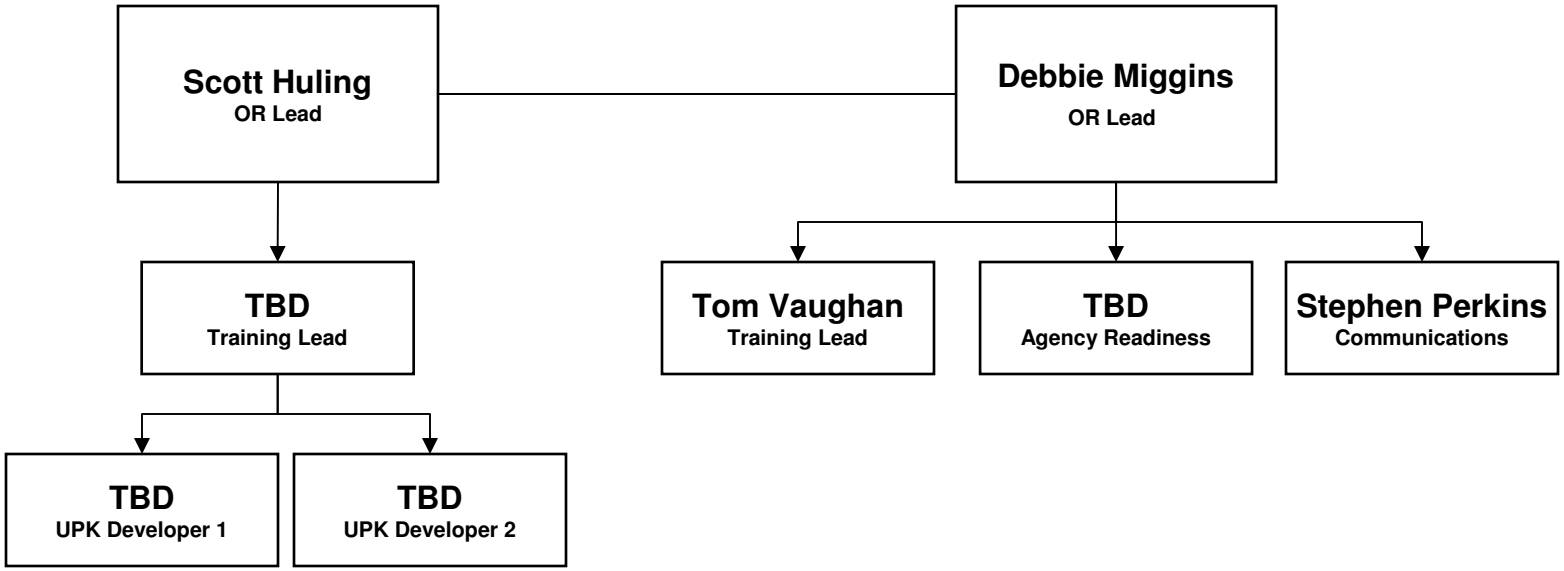
Technology- Hardware

- **New Development Database Cluster**
  - **Three Dell R910 Servers**
- **New Production Database Cluster**
  - **Six Dell R910 Servers**
- **New Development VMWare Cluster**
  - **Three Dell R910 Servers**
- **New Production VMWare Cluster**
  - **Four Dell R910 Servers**
  - **One Dell R710 Server**
- **New EMC VNX 5500 Storage Array**
  - **Storage for Development Databases and VMWare**
  - **69 TB Tiered Usable Storage**

Debbie Miggins
Organizational Readiness

Core-CT Upgrade Project Org Chart

Organizational Readiness

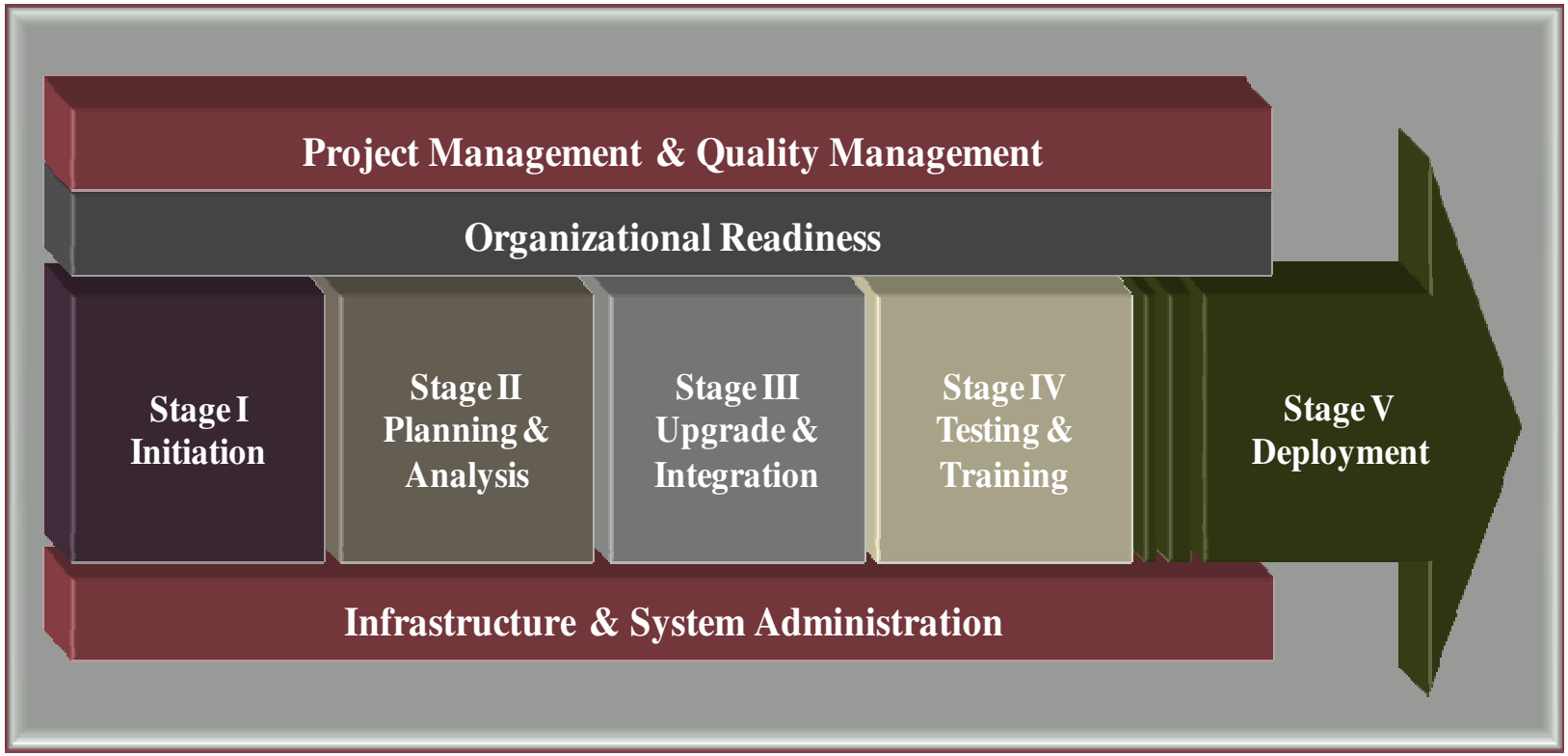


Organizational Readiness

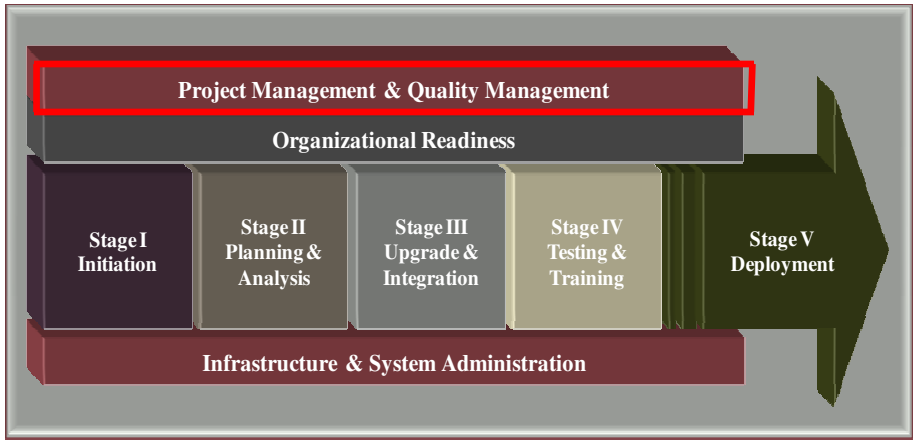
- Agency Readiness
  - Agency Readiness Coordinators Network
  - Quarterly Meetings for Sponsors & ARCs
- Communications
  - Multiple communications vehicles including the Core-CT website, project emails and team meetings
  - Consistent, clear messaging from a single source
- Training
  - Focused on changes from 8.9 to 9.1 and newly implemented functionality
  - Multiple training vehicles being considered to best fit Core-CT staff needs

Rob Koziol
CherryRoad Technologies

Core-CT 9.1 Upgrade Project Methodology



Project Management & Quality Management



Key Activities

- Management Meetings
- Quality Planning, Control and Assurance
- Risk and Issue Management
- Scope Management
- Project Staffing
- Project Documentation Management

Key Deliverables

- Project Plan
- Project Standards
- Status Reports
- Project Metrics

Organizational Readiness

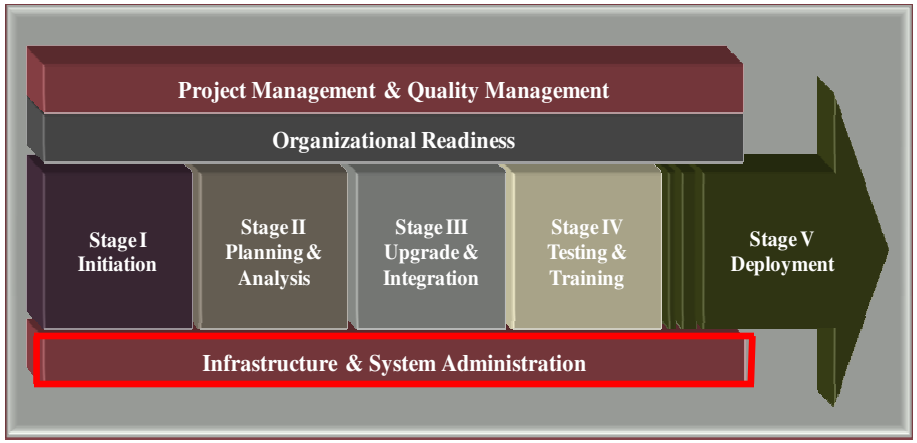
Key Activities

- Leadership and Goal Alignment
- Organizational Readiness Strategies
- Agency Readiness Coordinator (ARC) Network
- Project Communications
- End User Training Curriculum development and delivery

Key Deliverables

- Change Management Plan
- Communications Plan
- Training Needs Analysis
- End User Training Plan
- Change Impact Analysis
- End of Project Assessment

Infrastructure & System Administration



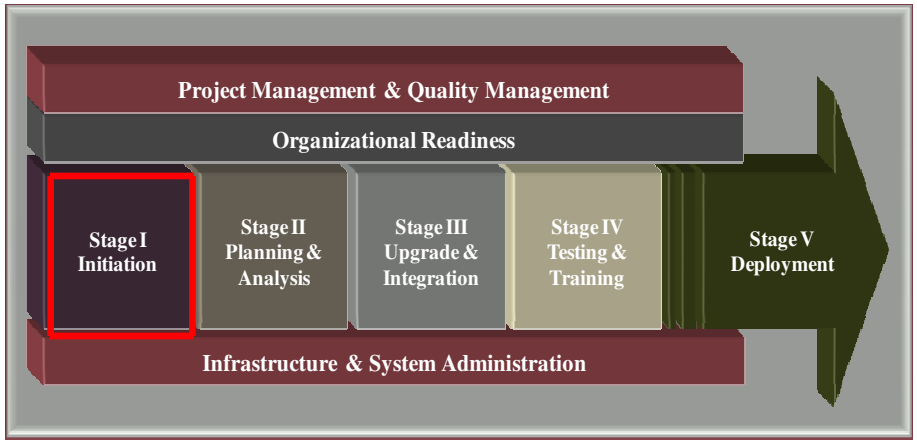
Key Activities

- Running Compare Reports
- Preparation and Set Up of Project Infrastructure
- Hardware Acquisition
- Third-party Software Management
- System Performance Testing

Key Deliverables

- Infrastructure Assessment
- Initial Upgrade Completed
- Performance Testing Plan
- Test Moves

Stage I - Initiation



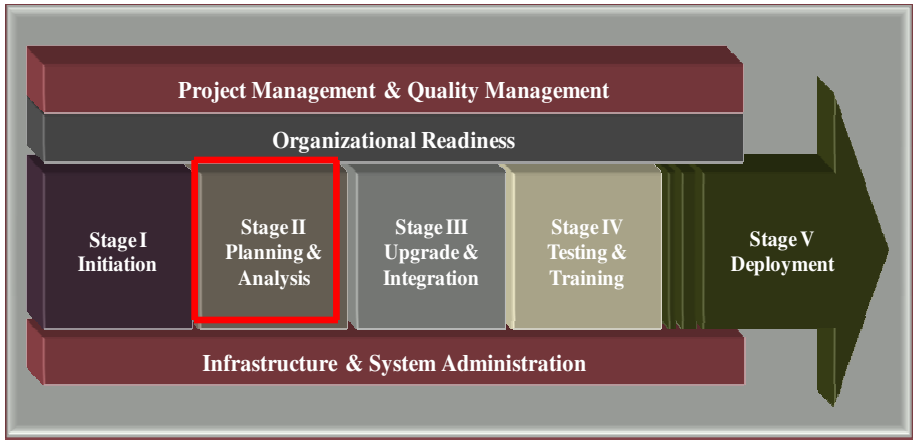
Key Activities

- Technical Team Training
- Upgrade Tracker Tool Installed
- Functional Team Training
- Project Team Kickoff

Key Deliverables

- Initial Project Plan
- Leadership & Goal Assessment

Stage II – Planning & Analysis



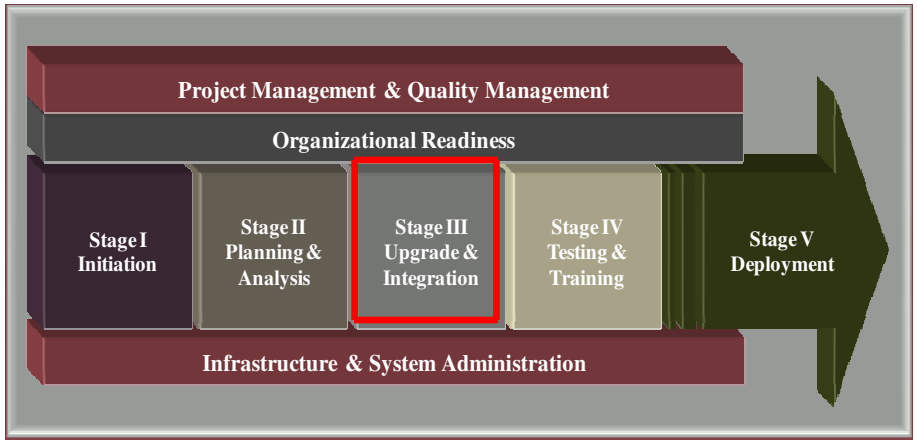
Key Activities

- Customization, Interface & ETL Retrofit Requirements
- Fit/ Gap Sessions
- Organization Kickoff Meeting
- Portal Requirements Defined
- Security Requirements Defined
- Workflow Requirements Defined
- Project Plan Updated

Key Deliverables

- Functional Requirements Documentation
- Fit/ Gap Analysis Documentation
- Gap Resolution Documentation
- Organizational Readiness Strategy
- Project Scope Document

Stage III – Upgrade & Integration



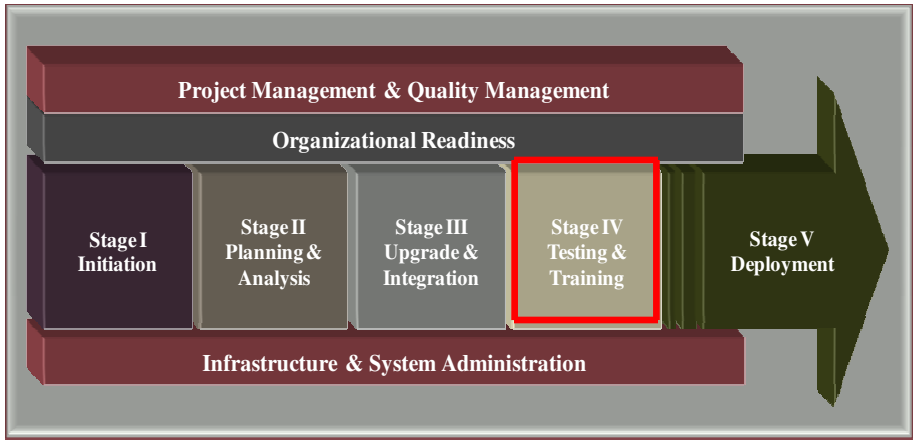
Key Activities

- Initial Upgrade Completed
- Interface Retrofit Specifications
- Architectural Specifications
- ETL Specifications & Retrofits Developed and Unit Tested
- Conversion Specifications & Retrofits Developed and Unit Tested
- Security Specifications & Configuration Completed and Unit Tested
- Workflow Configuration Complete and unit tested

Key Deliverables

- Application Configuration Documentation
- Change Management Plan
- Communications Plan
- End User Training Plan
- Test Plan
- Portal Design Specifications

Stage IV – Testing & Training



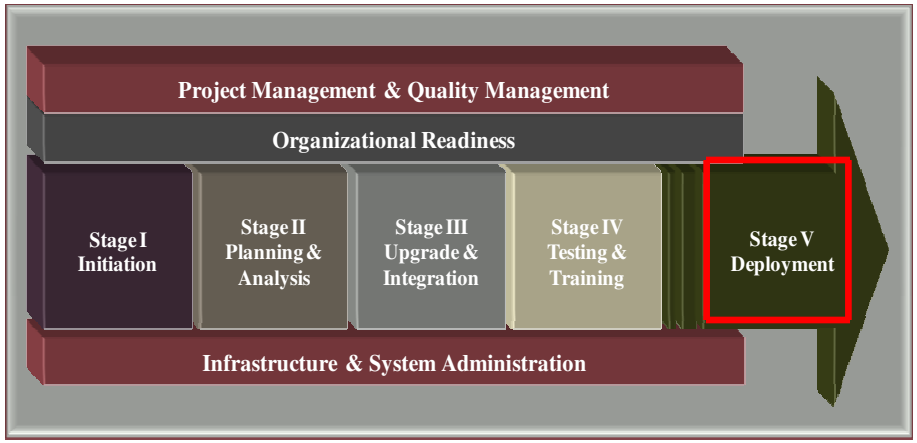
Key Activities

- Test Moves 1 & 2 Completed
- Final Interface Retrofit Specifications
- Final Customization Retrofit Specifications
- Test Scripts/Scenarios Complete
- Integration Testing
- End User Acceptance Testing
- Training Materials Developed
- Final Portal and Workflow Specifications

Key Deliverables

- Process Scheduler Calendar
- Final Application Configuration Document
- Change Impact Report
- Training Delivered to End Users
- Deployment Plan
- Conditional Acceptance Documentation

Stage V - Deployment



Key Activities

- Execute Deployment Plan
- Final Acceptance
- Go Live
- Production Support
- End of Project Assessment Surveys

Key Deliverables

- Ongoing Education Strategy
- End of Project Assessment Documentation

Question and Answer Session