SPLIT Campus Solutions & Human Capital Management

UPGRADE Financials & Human Capital Management & Portal

Kickoff
May 13, 2014
Agenda

- Welcome
- Project Scope
- Project Planning: Resources and Team
- Timeline
- Costs
- Communications Plan
- Risks
- Q&A
Project Scope Overview

- Split CS & HCM
- Upgrade HCM
- Upgrade Financials
- Upgrade Portal
Project Scope

- Split Campus Solutions & HCM into two applications
  - Name and address database is shared between applications
  - Application data is synchronized immediately (real-time)
  - Must be done before upgrading to HCM V9.2
Project Scope

- **Upgrade HCM from V9.0 to V9.2**
  - V9.0 goes off support Jun 2015

- **Upgrade Financials from V9.1 to V9.2**
  - 9.1 goes off support Nov. 30, 2014

- **Upgrade Portal to V9.1R2 and New PeopleTools**
Planning Overview

Schedule designed to ensure support for ongoing priorities

- **Phase I**
  - Split first: Releases CS from involvement in HCM upgrade and reduces complexity/risk
  - Upgrade Portal to V9.1R2
  - Upgrade Financials to V9.2

- **Phase II** – Upgrade HCM to V9.2 removing modifications where practical; no new modules

- **Phase III** – decide on additional HCM modules such as Talent Management
Business Impact: UA

- Enable the system to be managed separately
- Possible to apply upgrades to each system individually
- Keeps product maintenance current at highest level of support
- Significant change in the interface to the Data Warehouse
- Some customizations may be eliminated
Steering Committee


- David Cummins
- Nathan Mortimer
- Stacey Moore (Split only)
- Bill Viau
- Susan Rzyczycki
Oversight Committee

Receives project updates/status reports from the Project Manager. Resolves issues elevated from the project team. Meets monthly.

<table>
<thead>
<tr>
<th>Split</th>
<th>Upgrade</th>
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<tbody>
<tr>
<td>Ron Bowman</td>
<td>John Kovatch</td>
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<tr>
<td>Laurie Thorpe</td>
<td>Sarah Kelly</td>
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<td>Michelle Ellis</td>
<td>Diane Shovestull</td>
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<td>Diane Raybuck</td>
<td>Laura Spray</td>
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<td>Gail Hertzig</td>
<td>Laura Moss</td>
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<td>Sarah Kelly</td>
<td>Kris Feagan</td>
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<td>Laura Spray</td>
<td>John Corby</td>
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<td>John Corby</td>
<td>Joann Johns</td>
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Business Unit Responsibilities

- Furnish resources to carry out upgrade tasks
- Review and approve all decisions in timely manner or escalate for senior-level approval
- Proactively identify issues and recommend solutions
- Participate in project meetings and training
- Test and verify results
- Final approval and project sign-off
Business Impact: CS

- Shared Bio-Demo data with HR – real-time interfaces
- No changes to the name and address add/update business process
- Ability to apply bundles/updates independently of HCM once HCM V9.2 is live
- Bundles 33, 34, and possibly 35 must be installed during Split project
Business Impact: HCM

- Change in Look & Feel – One-Stop-Shop
- Work Centers/Pivot Grids/Dashboards
- Improved user experience for core transactions
- New plateau for Recruiting Solutions and workflow
- Mobile access to all info when on the move
- Business process review and adjustment
Business Impact: Finance

- WorkCenters bring together reports, tasks, alerts, links, etc., into an easy-to-use dashboard
- GL
  - Allocation migration from test to production
- AP
  - Simplified user interface for invoice entry & voucher inquiry
  - Taxpayer identification number validation automation
  - Payment request by end user (department)
Business Impact: Finance

- **Purchasing**
  - Price adjustment visibility on requisitions
  - Advanced purchase order and requisition line search

- **Grants suite:**
  - New Receivables Dashboard - Customer Aging, Payment Status, Posting Errors
  - New attachment capability in Receivables
  - Improved Billing and Receivables maintenance functionality
Tentative Timeline

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<td>Campus Solutions/HCM Split</td>
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- Campus Solutions/HCM Split
- Portal Tools/R2 Upgrade
- Financials Upgrade V9.2
- HCM Upgrade V9.2
Project Goals*

- Kick off: May 2014
- Split Test One: July – Aug 2014
- Split Test Two: Aug – Oct 2014
- Split in Production: Nov 2014
- Portal in Production: Aug 2014
- Finance Testing Begins: Sep 2014
- Financials V9.2 in Production: Dec 2014
- HCM Testing Begins: Jan 2015
- HCM V9.2 in Production: June 2015

*approximate dates
Estimated Costs

- Split Assessment  $15K
- Architect/Upgrade Split & HCM  $130K
- Security  $93K
- HCM Upgrade Lab  $165K
- HCM Business Process Analyst  $48K
- Financials Upgrade  $25K
- Personal Computers  $40K
- Servers & Storage (completed)  $180K
Communications Plan

• Disseminate information to committees and UA
• Ensure users understand complexities of project
• Create sense of teamwork

• Methods
  ◦ Web site
  ◦ Emails (as appropriate)
  ◦ Demo site
  ◦ Status reports
  ◦ Face-to-face meetings

• Ownership/Responsibility/Support
  ◦ Project leaders
  ◦ IT Comm. Officer (Giannone) working with project leaders/committees
● Other strategic initiatives/priorities
● Loss of key personnel
● Technology discovery: e.g., security, PS tools
● Budget
● Administrative and organizational changes
● Issues our partner (LCCC) may encounter
Questions?