



# Upgrading to HCM 8.9...

## The HR Side of the Story

-Presented by Carrie Medders,  
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# The Who

- **Carrie Medders**
  - HR Project Manager and Manager, Training & Support
  - Chair, HEUG HRMS PAG



# The Who

- San José State University
  - 1 of 23 California State University campuses
  - Approximately 30,000 students
  - Oldest institution of public education on the west coast
  - Silicon Valley's metropolitan university



# The Systems

- HCM 8.9
  - Human Resources and Campus Solutions
  - User Base
    - Employees
      - 400+ staff members
      - 2,000+ faculty members
      - 4,500+ use employee self-service
    - Students
      - 30,000 current students
      - 20,000 student applicants



# The Systems

- Finance 8.4
  - User Base
    - 400+ staff members
- Portal 8.8
  - Employee and Student Self-Service
- Custom Bolt-Ons
  - Finance Web Component
  - Student Messaging System



# The Outline

- Timeline
- Project Planning & Management
- Fit Gap & Testing
  - Functionality review
- Testing
- Training, Documentation & Support
- Communication



# The Timeline

- January 2005 – May 2005
  - System-wide fit gap
  - Campus planning
- May 2005 – August 2005
  - Campus planning
  - System-wide development



# The Timeline

- August 2005 – December 2005
  - Campus level fit gap
  - Campus development
  - Data validation
  - Testing
- December 2005 – February 2006
  - Testing
  - Campus development
  - Data validation
  - Go-Live: February 28, 2006



# The Planning

- Resources
  - 1 full-time project manager
  - 1 full-time analyst/trainer
  - 2 part-time project support
  - 1 full-time/1 part-time programmer
  - 1 full-time/1 part-time technical consultant
  - HR functional leads as needed



# The Planning

- Project Management
  - Microsoft Project
  - Weekly project team meetings
  - Weekly system-wide pilot meetings



# The Fit Gap

- Who
  - Central users and end users
- What
  - Review existing functionality compared to new; determine changes to software and business processes
  - Review new tools and determine usage



# The Functionality

- Position Management
  - Biggest changes: removal of descr254 field, update incumbents now allows update of salary grade/plan
  - Determined change was minor, process easily transitioned to 8.9



# The Functionality

- Recruiting Solutions
  - Major changes across the board
    - Record structure
    - Page & processing changes
    - HRS\_PERSON\_ID vs. APPLID
    - Security
    - Manage Hires functionality impacts Workforce Administration
  - Candidate Gateway go-live May 2006



# The Functionality

- Workforce Administration
  - Major change with Person Model
    - Org Instance usage
    - Security
  - Expected End Date
    - Conversion issue due to custom field
  - Expected Return Date
    - Not included in delivered conversion scripts
  - Position Data Override
  - Other changes determined to be minor



# The Functionality

- **Benefits Administration**
  - Biggest change: effective dating for dependents
  - Determined change was minor, process easily transitioned to 8.9



# The Functionality

- Time & Labor
  - Biggest changes: look and feel of self-service; more efficient Time Administration; ability to approve reported time
  - Determined changes were minor, process easily transitioned to 8.9
  - Customizations to self-service brought forward
  - Reviewed with Absence Management in mind (go-live July 2006)



# The Functionality

- Administer Training (*Enterprise Learning*)
  - Biggest change: Person Model, workflow in self-service
  - Self-Service customization removed workflow in 8.0, replicating in 8.9 more comprehensive due to workflow changes
  - Administrative processes very similar



# The Functionality

- CSU Custom Processes
  - Temporary Faculty Contract processing
  - Labor Cost Distribution
- SJSU Custom Processes
  - Finance Web Component for HR expenditure adjustments



# The Security

- Redesign of perm lists and roles
- Row Level
- Person Security
- Recruitment Security
- Time & Labor Security



# The Testing

- System-wide Testing
  - Project Manager
  - Analyst/Trainer
- Campus Testing
  - Project Manager
  - Analyst/Trainer
  - HR Staff



# The Testing

- Campus Testing
  - Unit Testing (2-3 weeks)
    - Review existence of pages, ability to key data
  - System Testing (4 weeks)
    - Review existence of pages, ability to key data and ability to use data throughout system – integration points
  - User Acceptance Testing (3 weeks)
    - Final review – no surprises expected



# The Training

- Web based introductory course
  - Look and feel
  - New terminology
  - Navigation
- No major instructor-led effort
  - Determined changes were minor enough not to warrant large-scale effort
- Open Labs & individual training planned as needed



# The Documentation

- Fit Gap Notes
- Issues & Action Items
- Business Process & Quick Reference Guides
  - Updated from 8.0
- Posted in common locations and on project web site



# The Support

- Portal & Web content manager
- Analyst/Training team
- Help Desk team



# The Communication

- Numerous campus meetings
- High-level in-person overviews
- Campus newspaper
  - Articles
  - Advertisements
- Portal & Web



# The Challenges

- Recruitment
- Workflow-related customizations
- Security
- Conversion/Data Validation



# The Lessons

- You can't start early enough
  - Customization review
  - New functionality review
  - Security
- Have the right people in the room
- Don't assume data converts easily
- Don't assume users will read or listen



# The End

- Questions?
- More information...
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