



## CMS Project Team — Reference Guide

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**System(s) Impacted:** Policies

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## Vision Statement

As a result of a successful Collaborative Management Systems (CMS) project implementation SJSU will operate in an environment where:

- Students have access to information and technology to enable and enhance their educational experience within our systems.
- Faculty members have the ability to pursue educational excellence, being enabled to serve their constituency, using the most efficient methods offered by the best technology and information dissemination can offer.
- Staff is able to efficiently operate and provide the highest quality service to the institution and it's constituents.

## Mission Statement

The mission of SJSU's administrative systems is to provide efficient, effective, high quality service to students, faculty, and staff. This mission will be accomplished in part through the achievement of the "target administrative environment". By the end of calendar year 2003 SJSU will:

- *Perform administrative functions in concert with a common set of administrative "best practices" approaches defined as the CSU Baseline.*
- *Support administrative functions (initially including human resources, financials, and student services) with a shared, common suite of applications software.*

## CMS Strategic Outcomes

- *High quality customer service*
- *Information quality*
- *Enhanced ability to manage change*
- *Personal satisfaction and productivity*
- *Cooperative environment*
- *Improved efficiencies*

## Business Objectives

CMS has identified the following Business Objectives as being key drivers for successful implementation of PeopleSoft applications. Upon completion of our implementation or within a designated period after the production launch date, we will have accomplished the following Business Objectives:

- Minimized cost to implement and maintain application software.
- Minimized time to implement application software.
- Adopted best practices or foundation for best practice, where possible, during the implementation process.
- Established standards to share information for common reporting purposes.
- Leveraged limited resources.
- Provided ready access to current, accurate, and complete administrative information and the means to use it in an efficient manner.

## Critical Success Factors

The following items have been identified as critical factors to achieving a successful implementation:

### Funding

- Adequate resources must be committed to the project.
- Once resources are committed to the CMS Project, they may not be diverted to other competing demands. However, given the length of the CMS effort and the unpredictability of economic conditions and future demands, care will need to be taken that the academic mission, which CMS is ultimately designed to support, is safeguarded.

### Project Governance/Leadership

- The President, his Executive Leadership Team, the Executive Sponsor, the CMS Steering Committee and the CMS Project Management Team must "champion" the project.
- Consensus must be built on the campus in order to ensure project support.
- CMS must provide vehicles for input from all constituencies in the implementation considerations for the baseline CSU/PeopleSoft applications. At the same time, continuous and timely progress toward the implementation schedule is essential.

### Resources

- "Real" availability of key personnel and the ability to "backfill" behind them is necessary to ensure success of CMS.
- I/T desktop and infrastructure resources needed for support must be implemented.
- The project team must possess an appropriate mix of skills.

### Training

- A robust training and support infrastructure must be delivered in a timely manner to SJSU faculty and staff both during and following implementation.

## Communications

- A clear vision, strategy, statement of goals, and migration timetable must be well defined and frequently communicated throughout the organization.
- Two-way, regular communication with stakeholders is essential.
- Coordination among CMS and other related initiatives must be accomplished.

## Effective Planning

- CMS is not merely a technology project, but a multi-faceted initiative that requires participation of all levels of campus management and staff and must integrate with the plans of the university that affect campus operations and budgeting.

## Reengineering

- A willingness to change and improve our business must be demonstrated.
- "Best practices" models for business processes must be defined and implemented where feasible.
- The CSU Baseline must be accepted as a "best practice" solution. Campus processes must be modified to implement the baseline when necessary.

## Buy-In

- Benefits to SJSU stakeholders must be demonstrated and their active involvement must be sought in implementation.

## Organizational Cooperation

- Incentives to move to common system approaches must be developed and offered.
- "Turf issues" must be quickly resolved as they appear.

## Project Scope

The scope of the project will include the following modules:

- Administer Procurement
- Process Financial Information
- Maintain People Data
- Develop Workforce
- Compensate Employees
- Administer Workforce
- Monitor Workplace
- Admissions
- Records
- Academic Advising
- Financial Aid
- Student Financials

Following are the major interfaces to be included:

- CSUMentor - XAP
- EDI
- STARRS - Hershey data upload for transcript data
- IVR
- Project ASSIST - transfer articulation data
- Room scheduling software - yet to be selected
- CashNet
- Credit card payment interface
- CPS - FAFSA data
- EdExpress
- EDFUND
- CSAC/Web Grants
- INS, SSN and Selective Service information interfaces

## Other Business Initiatives

It is not uncommon for an organization about to undertake a major software implementation to have other implementation projects or special projects in process. These other business initiatives may or may not impact the PeopleSoft implementation. The following is a list of the known business initiatives:

- Campus Portal
- DARS
- Technology Infrastructure Initiative
- Web enablement and interfaces
- Academic technology support/interfaces
- Cornerstones

## Project Constraints

There are budget constraints for this project that must be addressed throughout the project timeframe. Further, there are staffing and backfill issues that could impair the success of the project.

## Project Assumptions

### Baseline Development

- The target for an initial Human Resource and Finance phase 1 baseline prototype available for campus rollout is September 2000.
- The guiding design principle for the CSU/PeopleSoft applications is that all modules will be built around best business practices and will be implemented in a common, CSU-wide "baseline" version on all campuses. The design "bias" will be in favor of minimizing software modifications. (These principles are fundamental to the economies of scale and costs inherent in the shared software support/maintenance and hardware strategy).
- In the event that a business rule cannot be resolved by consensus, PeopleSoft "vanilla" will be used.
- The CSU/PeopleSoft applications will be implemented with an emphasis on ease of use and access regardless of level of campus user.
- CMS/PeopleSoft will strive to deliver multi-platform (PC, Macintosh) access to PeopleSoft applications — using various available technologies.
- PeopleSoft's most recent software version release (7.5 or higher) will be used for all prototype development. A model CMS Baseline Prototype will be developed for each application that will maximize common business rules and standard coding taxonomies to minimize need for customizing by a campus.

- The sequence of application module prototype development and implementation efforts is Human Resource, Financial and Student Administrative systems.
- A cross module integration issue identification and definition process will occur prior to prototype development and will guide overall prototype development and implementation efforts.
- If it is not possible to define a single model baseline, it may be possible to define two or three model baseline versions of an application according to some major differentiating factor, e.g., semester vs. quarter academic schedule.
- The first module will use a joint baseline prototyping approach. A functional group representative of the 11 first wave campuses will perform baseline analysis and design in prototype sessions, at strategic functional points the baseline model will be demonstrated and discussed with the functional experts at the 11 first wave campuses. Feedback and issues that come from the campus reviews will be incorporated into the baseline model by the central prototype team
- The "First Wave" baseline prototype development will have been completed for each of the three major applications within four years, i.e., those applications will be fully prototyped within four years from the first implementation start date.
- Implementation development decisions on the part of campuses that have already implemented PeopleSoft applications will not be binding on the other first wave campuses.
- Baseline rollout will be accomplished in phases made of selected functionality from each application.

### **Implementation**

- Implementation sequencing will occur with phased, common baseline modules.
- Following the collaborative implementation process, each participating campus will go through an individual implementation process - ideally abbreviated as a result of the collaborative first wave process.
- A collaborative implementation process by the first wave campuses can produce a model CMS baseline prototype that will significantly reduce the amount of fit/gap analysis required by each campus.

### **Process Change**

- Business process change may be required to minimize software costs. BPR will be pursued in favor of software modifications, but will not drive the implementation schedule.
- Academic Policy effecting faculty and students is not easy to change within the CSU environment and will require long lead times to accomplish.
- CSU Processes are driven by the state and there is not always the ability to change the process.

### **Resources**

- The hardware/operations outsourcer and the consulting implementation partner(s) will be in place and "up-to-speed" in time to support the "first wave" implementation.
- CMS will provide one central service center of qualified persons, consisting of contracted personnel and trained CMS staff, to provide campus implementation and training support, CMS baseline software maintenance and problem solving support.
- The shared service centers will be additional, segregated capacity that does not displace existing functionality during implementation.
- Training costs, campus-level project management and other consulting assistance, unique system interfaces, data conversion and modifications to the CSU baseline software will be paid for by campuses.
- While "first wave" campuses may experience some higher costs and risks, the later wave campuses will bear a similar burden of staying longer on legacy systems and longer period of foregoing the benefits of the new systems.

### **External**

- There is a continuing dependency on consistent state support for the success of the project.

## **Project Risks**

The primary risks to the project are competition with other priority initiatives in the CSU for funding, and the potential for lack of synchronization with projects on which CMS has a dependency for functional delivery.

## **Future Project Phase Considerations**

- Keeping versions of the PeopleTools databases in sync across the production databases.

## **Out of Scope Items**

- Addressing future software and design of the State system within the first phases of CSU PeopleSoft prototyping analysis.

## **High Level Interface Methodology**

Review PS data elements and interfaces data elements requirements to determine common elements. Where common elements are not carried in the PS module, determine if crossover tables can be built to fulfill the requirements of the interface without adding unneeded elements to PS applications. When elements are needed in the PS application, careful design should be taken to not impact future releases of People Soft as much as possible.

## **High Level Conversion Methodology**

- Determine if legacy data needs to be converted or whether Data Warehoused data with OLAP Tools are sufficient.
- If data is to be converted then tools should be evaluated to develop a standard methodology that can be followed throughout the various modules and shared for uncommon systems.
- Consideration should be given to generating Import Templates Programs during the baseline prototype effort to ease the burden on individual campus efforts. Campuses will be required to put data into the format required by the templates.

## **High Level Reporting Strategy**

### **Internal Reporting**

- Review PeopleSoft reports for internal use.
- Evaluate existing reports from legacy applications to determine if any of the reports will need to be developed in PeopleSoft.

### **External Reporting**

- Determine external reporting requirements.
- Review PeopleSoft delivered reports for suitability for external reporting needs.

### **Data Warehouse**

- Evaluate OLAP tools and reporting capabilities

## Goals for reporting

- Drive toward a paperless reporting environment
- Web deployment
- Evaluate current reports to determine if they are necessary

## High Level Third Party Integration Strategy

- Evaluate products and needs for an implementation toolkit
- Conversion toolkit
- Business process mapping
- Fit/gap analysis
- PeopleSoft certified or baseline supported where possible

## High Level Data Management Strategy

### Data Mapping

- Determine which data elements from the existing environment will map to the elements in PeopleSoft.

### Data Clean-Up

- Determine which data elements will need to either have their values changed to meet relational formatting (e.g. spaces to nulls), or replace data that is erroneous.

### Data Conversion

- Convert existing data that is cleansed and mapped appropriately.

### Adding new elements and data populating

- Where determined appropriate create new elements and values.

### Change Management

- Try to isolate the changes whenever possible to separate programs or panels. Create source libraries, which have a hierarchy that allows programs that have been modified to meet CSU requirements to reside in a CSU baseline that has precedence over the PeopleSoft vanilla library. SJSU can have an additional source library, which will have any programs, or panels that have SJSU specific changes that would take precedence over the other source libraries.

## Project Team Organization

**Executive Sponsor:** Rose Lee, AVP Finance and Administrative Program Planning

**CMS Project Director:** Shawn Bibb

**Human Resource Implementation Team Lead:** TBD

**Finance Implementation Team Lead:** Paul Siegel

**Student Administration Implementation Team Lead/SA Project Manager:** Marilyn Radisch

## **SJSU CMS Steering Committee**

- Chair – Rose Lee: AVP, Financial and Administrative Program Planning
- Dona Bertain: AVP, Human Resources
- James Brent: Chair, Academic Senate
- Nancy Fimbel: Associate Dean, College of Business
- Mary Jo Gorney-Moreno: AVP, Academic Technology (Interim)
- Sylvia Hutchinson: Public Affairs Officer
- Bruce Judd: AVP, University Computing & NetTel
- Don Kirk: Dean, College of Engineering
- Irene Miura: Executive Assistant to the President
- Marty Schuler: AVP, Student Affairs (Interim)
- Linda Vasquez: AVP, Business Operations
- Leon Washington: AVP, Enrollment Services

## **Participants**

- *Shawn Bibb: CMS Project Director*
- *Katie Hill: CMS Technical Lead, CO PeopleSoft Administrator*
- *Marilyn Radisch, CMS SA Project Manager*

## **CMS Project Management Team**

- Co-Chair – Shawn Bibb
- Co-Chair – Rose Lee
- Dona Bertain: AVP, Human Resources
- Mike Dunefsky: Campus CMS Technical Infrastructure Group (TIG) Representative
- Mary Jo Gorney-Moreno: AVP, Academic Technology (Interim)
- Katie Hill: CMS Technical Lead/Campus PeopleSoft Administrator
- Bruce Judd: AVP, University Computing and NetTel
- Carrie Medders: CMS Training & Help Desk Coordinator
- Steve Prinz: DBA Manager
- Marilyn Radisch: CMS SA Project Manager
- Linda Vasquez: AVP, Business Operations
- Leon Washington: AVP, Enrollment Services

## **End User Training Strategy**

End user training will be provided through various media. SJSU will establish a PeopleSoft help desk that will not only provide initial hands-on training but will also provide individual assistance as needed. Further, Business Process Guides will be developed that provide the end user with step-by-step instructions. Refer to Training Strategy and Help Desk Strategy documents.

## High Level Test Methodology

- Test established system parameters and business rules.
- Test system modifications and enhancements that have been made to comply with client and regulatory requirements.
- Provide client staff with on-hands experience and training by testing the system in a simulated production environment.
- Finalize procedures and processes for documentation requirements.
- Ensure that security parameters are established as defined.

## Status Reporting Procedures

- Status reports will be delivered in a standard format.
- Each team will present a status report, minimally, on a monthly basis to the appropriate committee.
- Team members will present status reports on a weekly basis to the appropriate lead.
- Electronic mail will be the preferred delivery method of status reports.

## Status Report Formats

**The approved individual status reports will have this format**

TO BE NOTED:

Notes

DESCRIPTION OF TASKS COMPLETED (Last two weeks):

Tasks

TASKS TO BE COMPLETED (Next two weeks or long term):

Tasks

ISSUES:

Issues

The approved team status reports will have this format

General Statements:

General Statements

Detailed status by work team: (all on schedule unless otherwise noted)

Functional Team

Technical Team

New issues:

Problem Statements

Outstanding issues:

Problem Statements

Resolved issues:

Resolved Problems

Successes:

Successes