



## HR Implementation Council Meeting Summary

California State Polytechnic University Pomona

### Meeting Logistics

<b>Title</b>	HR Implementation Council
<b>Purpose</b>	Discuss implementation issues on the upgrade to CMS/PeopleSoft HR Version 8.0
<b>Date</b>	Tuesday, October 17, 2002
<b>Time</b>	9:30 to 10:30 AM
<b>Location</b>	Building 13C
<b>Participants</b>	Tom Adamski, Joe Belarde, Burt Casey, Williams Espino, Carol Heins-Gonzales, Jane Peters, Jane Self, George Trindle, and Glendy Yeh

### Agenda

<b>Topic</b>	<b>Led By</b>
Topic 1: Action Items	Carol
Topic 2: Database Conversion	Joe & George
Topic 3: Go-Live Dates	Carol
Topic 4: Reporting	Burt & Joe
Topic 5: Security	Glendy
Topic 6: New Topics	

### Summary of Discussion

#### 1. Action Item List

Item #3 – C – Burt completed access for Tom and Bill.

Item #4 – IP – George gave Burt the first pass on Friday. Jane will look at it next.

Item #7 – C – Mauricio completed Faye reports for the campus presentation. Sui will handle new requests.

Item #9 – IP – Glendy is in the process of creating new views for Enterprise Computing employees who are using HR data to assign Intranet accounts.

Items #10 – 12 – New items from discussion below.

Date Initiated	Activity	Responsibility	Target Date	Status
9/3/02	1. Database Conversion #2	Tom Adamski	9/4/02	C
9/3/02	2. Develop plan to coordinate the work of George and May	Tom Adamski	9/19/02	C
9/3/02	3. 7.6 Test access for Sui, May, Tom & Bill	Burt Casey	<del>9/8/02</del> 10/11/02	C
9/3/02	4. Data verification process between SCO and PS	George Trindle	<del>9/17/02</del> <del>10/17/02</del> 10/31/02	IP
9/19/02	5. Check with Finance Team on temporary elimination of databases	Glendy Yeh	9/20/02	C
9/19/02	6. Information for September CMS Status Report to Stephanie	Burt Casey Joe Belarde	9/30/02	C
9/19/02	7. Help Faye & Tom with 7.6 reporting issue	<del>Joe Belarde</del> Tom Adamski	<del>10/01/02</del> 10/11/02	C
9/19/02	8. Contact Barbara Engravidio about new Go-Live date	Stephanie Doda	9/20/02	C
10/1/02	9. Create new view for EC to limit exposure of HR data	Glendy Yeh	<del>10/17/02</del> 10/31/02	IP
10/17/02	10. Evaluate turning off databases to improve performance	Glendy Yeh	10/31/02	N
10/17/02	11. Followup with Project Mgt about adding reporting resource	Carol Heins-Gonzales	10/21/02	N
10/17/02	12. Coordinate meeting with HR, Budget & FA on department IDs	Carol Heins-Gonzales	10/31/02	N

*Legend: N-new, IP-in progress, P-pending, C-completed*

## **2. Database Conversion**

Database conversion #2 took 97 hours. George passed out a chronology or the time for each task. During the final upgrade, the upgrade will be 97 hours using a 24 hour clock. CMS will provide support. They are currently implementing security and then will test again.

## **3. Go-Live Dates**

CMS has approved our December 23 Go-Live date. Beginning the first week of November, our campus will meet/phone with Barbara Engravido (CMS) to begin coordination for the upgrade.

CMS delivered another upgrade for 7.6 on November 5.

Burt distributed a status of the major segments of the project: reports/queries, security, time/labor, testing, benefits data cleanup, department ID cleanup, and faculty affairs data cleanup.

## **4. Reporting**

The reporting segment of the status report showed a total of 68 reports to be coded (58 closed and 10 new). Since Sui was reassigned to Finance due to Betty's leave of absence, there is a concern that reports will not be completed. Mauricio is working at Fresno for a 2 week period as well. HR application support staff would like access to develop their queries if EC is unable to provide staff to support report development. Carol committed to following up with EC, Stephanie and Cedar.

Report database is expected to be available next week.

## **5. Security**

The security section discussed the process of establishing new guidelines and modifying/testing permission, lists, roles and users. Guidelines have been created with new naming conventions and the completing of new documentation. Adeline is setting up security.

## **6. Time/Labor**

Since 8.0 Time/Labor is rebuilt, additional setup will be involved. There is also concern for the amount of effort needed to do data entry since the screens are not optimized for efficient data entry. HR staff is planning to evaluate the Long Beach package to see if it will help us roll out student time reporting. The Long Beach package includes a spreadsheet that is distributed to the department. A SQR is used to read the flat file and load it into PeopleSoft. Testing of LCD and ESP is delayed due to analysis of data entry issues.

## **7. Benefits Data Cleanup**

Tasks include cleaning up data for health, dental, and TSA data. The clean up is slow. Maribel is currently helping with the data clean up. HR intends to add 2 more persons to the effort with another person to follow after open enrollment.

## **8. Department ID Cleanup**

An analysis needs to be performed to identify the issues associated with the current department Ids such as WTU and HR reporting. Carol will be coordinating a meeting with Human Resources, Budget and Faculty Affairs.

## **9. Faculty Affairs Data Cleanup**

New requisitions may need to be created since 8.0 requires a requisition for each contract. It will also assist in identifying Faculty Affairs requisitions from HR requisitions.