PeopleSoft Upgrade Overview and Status   https://web.peralta.edu/it/peoplesoft-upgrade/

PeopleSoft Upgrade

PeopleSoft Project Overview
Technical and Application Modernization

Current Situation:
- o PeopleSoft Campus Solutions (Student Portal) on outdated version 9.0
- o PeopleSoft HCM (HR, Benefits, Payroll) on outdated version 9.0
- o PeopleSoft ERP (Financial System, Accounting, Billing) on current version 9.2
- o Microsoft SQL database platform
- o PeopleSoft currently hosted @ Microsoft Azure Cloud
- o No Disaster Recovery Plan and business continuity
- o High-Cost Cloud Model
- o Hybrid Support Model (Microsoft and Oracle), i.e. we are getting support from both companies

Future State:
- o PeopleSoft Campus Solutions (Student Portal)-upgrade to current version
- o PeopleSoft HCM (HR, Benefits, Payroll)-upgrade to current version
- o PeopleSoft ERP (Financial System, Billing)-upgrade to current point release (ugraded release)
- o Migration to Oracle database
- o Migration to Oracle Cloud Infrastructure
- o Addition of Max Availability Disaster Recovery Option
- o Addition of Oracle Managed Services and Oracle Functional Services
- o Deliver a supported, maintained, and stable platform upon which future implementation projects can occur

Phase I: Business Benefits
- o All Applications on most current version- no future upgrade projects needed
- o Single Vendor- Sole Sourced Approach to Project- Peralta cannot go live @ Oracle CI (cloud infrastructure) on current versions – Oracle and Peralta must perform the migration and upgrade successfully
- o Leverage Oracle CI (cloud infrastructure) and Oracle database- simplified support model, simplified contracting, simplified vendor management
- o Oracle Managed Services- a single point of contact for all Oracle support issues; integrated management of the entire technical stack
- o Direct Access to Oracle Product Development and Product Management when needed
- o Vendor managed system- decreased risk profile = *Oracle on Oracle Managed by Oracle*
- o Vendor provided security services- Oracle CI (cloud infrastructure), database, and applications- a single point of contact
- o Oracle certified configuration of all technical and application components- everything works together as expected
- o Implement new PeopleSoft Fluid User Interface – enables mobile functionality (iOS and Android)
- o Stable platform for future growth, additional software projects, etc.
- o Functional Services- provides application-level support to power users
- o Applications Differences Training 9.0 to 9.2
- o Oracle provides the Project Manager, and Technical Leads during the project and Service Delivery Team to support post-project

Phase II – Business Process Enhancement
- o Implement additional PeopleSoft modules driven by FCMAT Report on June 28, 2019
- o Standard Module Functionality in HR (Time and Labor, Position Management, Manager Self Service, and Management Commitment Accounting)
- o Standard Module Functionality in ERP/Financials (Supplier Contract Manager, Asset Management, Expenses, Inventory, Project Costing, Strategic Sourcing)
- o Project Management Resource
- o Technical Lead Resources
- o Functional Lead Resources
- o Program Management Resource
- o Development of User Training Handbooks
- o Sponsorship of Oracle and Peralta Governance Committee

Future State:
- o All Required Modules fully implemented and rolled out to Peralta Business Users
- o Technical and Functional Helpdesk to support users

- Expanded Mobility Functionality across PeopleSoft HR, PeopleSoft Financials and PeopleSoft Campus Solutions (Student Portal)
- Enhanced Development of Automated Processes, Reporting, Data Management
- Compliance with Financial Review and Fiscal Health Risk Analysis Report dated June 28, 2019
- Broader and Deeper Adoption of New Technology- mobile, workflow, automation,
- A Fully Integrated, Managed and Supported Application Platform by Oracle

PeopleSoft Phase I Task (Completed)

https://web.peralta.edu/it/peoplesoft-upgrade/peoplesoft-phase-i-task/

Peralta Technology Modernization: PeopleSoft Upgrade Phase1 Tasks
Task 1-Migration:
This task began by conducting trial runs of moving PeopleSoft application data to Oracle. This was an evaluation of the migration process that would eventually take place for Finance, Human Capital Management and Campus Solutions pillars. Testing was completed to thoroughly evaluate the move to the new system. No issues were identified, and this step was marked as completed.

Finance Pillar, Human Capital Management & Campus Solutions Pillar
✔ **1st Testing – Complete 100%- All issues identified were resolved.**
✔ **2nd Testing – Complete 100% – All issues identified were resolved**
Task 2-Customization and Retrofit Identification for Move to Oracle PeopleSoft 9.2
This second task was focused on identifying any specific modifications or retrofits that would be needed once the District systems were moved to the new PeopleSoft upgraded system. These were meticulously examined and addressed one by one to ensure all systems would migrate correctly without any issues. The retrofits that were identified were shared with the Oracle team, and then these were addressed and included in the final upgrade. We were successful in addressing all needed customizations for Peralta business processes.

✔ **Code Freeze – Shared list of needed modifications for the project for each Pillar- Oct. 30, 2021 – Complete**
✔ **Finance Pillar- 100% Complete**
✔ **Human Capital Management Pillar– 100% Complete**
✔ **Campus Solutions Pillar – 100% Complete**
Task 3- Peralta Testing of Customizations and Retrofits
Task 3 was centered on testing the identified customizations and retrofits. These tests were done to ensure the new environment was ready for an upgrade to a new system when the final Go-Live took place. This task was completed without any issues, and the system was approved for migration to the Oracle PeopleSoft 9.2 system. All the information and testing results were then

shared with Oracle to prepare for the move. Each unit manager signed off on the user acceptance testing and IT signed off on system integration testing.

✔ **Peralta System Integration Testing – Dec. 7-23, 2020 – 100%-Complete**
✔ **Peralta User Acceptance Testing – Jan. 4- Feb. 9, 2021**
✔ **Finance Pillar- Oracle Retrofit Unit Testing -100% Complete.**
✔ **Human Capital Management Pillar-Oracle Retrofit Unit Testing -100% Complete.**
✔ **Campus Solutions Pillar-Oracle Retrofit Unit Testing -100% Complete.**
✔ **Campus Solutions & Human Capital Management Pillar– Oracle Regression Testing -100% Complete.**
The following are the specific tasks in Section 2:
Task 1- PeopleSoft Exchange of Data and Integration
We exchanged our PeopleSoft data with Oracle so our systems would transfer with the new upgrade. Files were prepared for integration as well as each of the existing modules. Then Oracle completed testing of the systems.

✔ **File based Integration – 100% Complete.**
✔ **Module integration – 100% Complete**
✔ **Development – Oct. 12 to Dec. 4, 2020- 100% Complete**
✔ **Oracle Testing – Nov. 2 to Dec. 4, 2020- 100% Complete**
Task 2- Information on Customization and Retrofits
During task 2 Oracle provided training to functional analysts representing Finance, Human Capital Management, and Campus Solutions. All of the needed retrofits were also completed.

✔ **Oracle provided all information and Training**
✔ **Retrofits Human Capital Management Pillar- Nov. 30- Dec. 4, 2020-Complete**
✔ **Retrofits Campus Solutions Pillar -Nov. 30- Dec. 4, 2020-Complete**

✔ **Retrofits for Finance Pillar -Nov. 30- Dec. 4, 2020-Complete**

Task 3- Cut Over and PeopleSoft 9.2 Hand Over to Peralta

Task 3 required each department to compete testing of their systems before the handover to Oracle. Each department signed off that this step was completed. Peralta systems were temporarily shut down from Feb. 10-15, 2021 while all data was transferred to Oracle for completion of the upgrade. We then completed a partial test of the new system before all of the upgraded systems were returned to Peralta. Go-Live was successful Feb. 16, 2021.

✔ **UAT Sign Off – Feb. 5, 2021 – received for Finance, Human Capital Management, and Campus Solutions**

✔ **Cut Over start – Feb. 10 @ 21:00 PM**

✔ **Cut Over Ends – Feb. 15@ 11:00 AM**

✔ **Smoke Testing- this is partial test- Feb. 15@ 11:00 AM**

✔ **Go-Live = Finance Pillar, HCM Pillar, and CS Pillar- Completed Feb. 16, 2021**

Task 4-Disaster Recovery Site Building

During task 4 Oracle completed the setup for a new disaster recovery site to ensure business continuity in case a major disaster to the system occurred. This disaster site is a mirror reproduction of our current site, and we will be testing at the site annually to ensure efficiency and accuracy

✔ **Core Build for Disaster Recovery Site – 100% Complete**

✔ **Infrastructure Build – Finance Pillar, Human Capital Management Pillar, Campus Solutions Pillar – 100% Complete**

✔ **Sync – 100%Complete**

✔ **Virtual Private Network Build -100% Complete**

Task 5- Post Go-Live Support and Closure of Phase 1

This task involved making sure that all systems were stable after the Go-Live was launched. Any issues that arose were solved with the contracted support of Oracle. There were no critical issues post Go-Live. To ensure success of a District our size, we further extended the stabilization period to make sure all systems were functioning properly. On March 19, 2021 Phase 1 will be moved to closure, and all systems will be operated and maintained in a support status

✔ **Contracted Stabilization – Feb. 15 – Mar. 12, 2021 – Complete 100%**

✔ **Stabilization period was extended till Mar. 19, 2021 to ensure continued success.**

✔ **Closure of Phase 1**

Pillars	Finance	Human Resources	Campus Solutions
Percentage of Completion	100%	100%	100%

Benefits of Oracle's PeopleSoft 9.2 Upgraded System:

✔ All three pillars, Finance, Human Capital Management, and Campus Solutions are strengthened and updated with enhanced features and functionality of PeopleSoft 9.2.

✔ Increased mobile device access for students and staff.

✔ Infrastructure security is shifted to Oracle's advanced cloud security.

✔ Protection and liability are now guaranteed through Oracle.

✔ A designated disaster recovery site was created to replicate and store systems at a separate geolocation in case of a technology malfunction or a serious natural or manmade disaster with a recovery time objective (RTO) of one hour.

✔ Systems designed to meet the FTMAC, CBT, and ACCJC Standard IIIC recommendations.

Milestone	Dates	Notes
Provisioning – (All 3 Pillars)	Jun-16 to Aug 24	Completed
Trial Run – 1st Iteration	Aug10 – Aug31	Completed
CEMLI Retrofit	Sep03 – Dec04	Completed
Peralta to Code Freeze	Oct-30-2020	Completed
Integration/Interfaces	Oct-12 to Dec04	Completed

PeopleSoft Application Testing	Dec-07-2020 – Dec-25-2020) (Dec-28-2020 – Jan-21-2021)	Peralta to arrange functional team to test complete and integrations
Phase 1 CEMLI retrofit Training	Nov30 – Dec04	Make Peralta functional People available
Trial Run – 2nd Iteration	28 Dec – Jan03	Peralta IT team to provide Data from business users system to start trail run
DR Instance build and sync	Jan-03 to Jan20	Completed Test schedule September 2021
Cut Over Plan & Go-Live	Feb 11 to Feb 15	Peralta team to provide data from current system for go-live cut over plan

Peralta-Technology-Modernization-PeopleSoft-Upgrade-9.1-Phase-1-TasksCompleted

PeopleSoft Phase II Upgrade FSCM

https://web.peralta.edu/it/peoplesoft-upgrade/peoplesoft-phase-ii-upgrade/

**PeopleSoft Upgrade 9.2 Phase II Business Process Modernization
Finance Supply & Chain Management**

New Modules
• Asset Management
• Expense Management
• Supplier Contracts

Project Goal
Utilize District Resources effectively and efficiently
1. Asset Management module will be implemented to track all the assets greater than 5000$ and provide the net book value to management
2. The Supplier Contract Management module provides a centralized contract clause library used for executing purchases, which allows the District to author, approve, manage documents and amendments, preserve legal documents and execute contracts via Adobe Sign between Suppliers and the District
3. Expense Management module will be implemented to replace manual process in administration and tracking of District's travel expenses

Asset Management module will be implemented to track assets greater than 5000$.

- o . Asset Management module will record and store required asset information in our Oracle database.
- o Basic information will be tracked for each asset. This includes cost, quantity, in-service date, depreciation method, category, profiles, location, asset types, book, tag number serial ID, manufacturer, model number, etc.
- o Any asset more than $5,000 will be capitalized immediately and will have a corresponding asset tag.
- o Project Assets will be transferred to inventory after the completion of the project. These assets will then be considered as a "normal" asset thereafter.
- o Assets will be tagged in the PeopleSoft System with the implementation of this module.
- o Lease assets will be tracked.
- o Asset Physical inventory system features will be enabled and reports can be generated.

Implement Supplier Contract Module to replace existing contract administration
The Supplier Contract Management module provides a centralized contract clause library used for executing purchases, which allows the District to author, approve, manage documents and amendments, preserve legal documents and execute contracts via Adobe Sign between Suppliers and the District
- o Create contract – Only the Requisitioners who have the proper security can have access to create and submit contracts in the Oracle database.

- o Approve Contract- Only Approvers who have proper security can access and approve contracts
- o Create document
- o Create requisition and pre-encumber funds
- o Approve and sign documents – Submission will be done only after the requisition is created
- o Add contract ID to the requisition line
- o Approve and budget check the requisition
- o Run auto source to process the purchase order

Implement Expense Management module to replace Microsoft Word, Excel and Adobe Sign manual administration and tracking of District's Expense.
PeopleSoft Expenses module is an important self-service application used to automate and streamline the employee travel and expense transactions

- o Travel authorizations – Travel authorizations are used to pre-approve the not-to-exceed amount of travel costs.
- o Travel Advance – Requests will be submitted through the expense module
- o Expense reports – Expense reports are submitted after the travel to reconcile all the costs and advance against the travel authorizations.
- o We will no longer be using dummy vendor files for employees
- o Expenses can be classified and coded directly within the expense module

User and/or Requestor Training
- o User Training will be provided on how to use Asset Management module
- o User Training will be provided on how to submit travel and expense using Expense module.
- o User Training will be provided on how to request/create contract using Supplier Contract module.

Approver Training
- o Approver Training will be provided on how to make approvals using Asset Management module.
- o Approver Training will be provided on how to make approvals using Expense module.
- o Approver Training will be provided on how to make approvals using Supplier Contract module.

AWE Notification

- o Automated Workflow Electronic Notification will be send for any transactions that requires action.
- o Notification will appear in employee's PCCD email

FSCM Project team allocated to this project:
- o Purchasing
- o Accounts Payable
- o Finance Staff
- o Campus Users
- o Information Technology

Team Resources
Full collaboration and numerous work sessions are on-going between multiple departments to ensure the accuracy of business processes.

PeopleSoft-Upgrade-9.2-Phase-II-Finance-Management

PeopleSoft Phase II HCM Update

https://web.peralta.edu/it/peoplesoft-upgrade/peoplesoft-phase-ii-hcm-update/

PeopleSoft Upgrade 9.2 Phase II Business Process Modernization
     Human Capital Management New Modules
- o **Manager Self-Service**
  - • Position Management
  - • Time and Labor
  - • Commitment Accounting

Project Goal
Utilize District Resources effectively and efficiently
- o Replace PCCD custom built electronic personnel action form (ePAF) with PeopleSoft Manager Self Service.
- o Convert paper base leave action report form (LAR for full time employees) into employee electronic submission and electronic manager approval.
- o Convert paper timesheet form (for hourly and part time employees) into employee electronic submission and electronic manager approval.

Replace ePAF with PeopleSoft Manager Self Service

- eFORMS for various types will be created and will be available for Managers to initiate electronic personnel actions, e.g., hire, job data change, promotion, etc.
- Manager Self Service tile will be created in one place to make it easier for the manager to perform his/her task, e.g., initiate request, approve request, approve time submitted, etc.
- Approval will be streamlined and managers will have the ability to appoint a delegate during their absence.
- Managers will have the ability to view and manage their employee's available sick, vacation and floating holiday leave hours if applicable.

Convert paper base LAR into electronic employee time submission.

- Employees will have the ability to electronically submit Leave Absence Report (LAR for full time employees) via Employee Self Service (ESS).
- Employees will have the ability to view their sick, vacation and floating holiday hours in the same page where time is to be submitted.
- Student workers and hourly employees will have the ability to electronically submit *timesheet* hours and/or stipend request via Employee Self Service (ESS).
- Student workers and hourly employees will have the ability to view their sick hours from the same page where time is submitted.

Convert paper form approval for LAR and Timesheet into electronic manager time approval.

- Managers will have the ability to electronically approve Leave Absence Report (LAR) submitted by the employee by going to Manager Self Service (MSS) tile.
- Managers will have the ability to electronically approve Timesheet related hours and/or stipends submitted by student workers and hourly employees.
- Speeds up the time in processing LAR absences; No need to submit paper LAR to benefits department
- Speeds up the time in processing Timesheet hours and stipends. No need to submit paper timesheet to payroll department.

Manager Training
- Manager Self Service Timesheet & LAR Electronic Approval
- Manager Self Service Action Request Electronic Approval

Notification
- **Automated email notification will be sent to EMPLOYEEs to electronically submit time.**
- **Automated email notification will be sent to MANAGERs to approve time electronically submitted by their direct employees.**

HCM Project team allocated to this project:
- **Human Resources**
- **Payroll Department**
- **Finance Staff**
- **Information Technology**
    Team Resources

  Full collaboration and numerous work sessions are on-going between multiple departments to ensure the accuracy of business processes.

PeopleSoft-Upgrade-9.2-Phase-II-Human-Capital-Management