



California State University, Chico

**Common Management System
2000-2006 Implementation Report**

Version 1.0
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Introduction

The Common Management Systems (CMS) is a CSU initiative to bring state-of-the-art services to students, faculty, and staff through improved, integrated administrative systems for human resources, financial, and student information. In 1997 the Chancellor's Office implemented the Common Management Systems (CMS) effort to consolidate the management systems of the CSU system and to identify one software package, which would effectively support its Human Resources, Financial and Student systems. Software solutions were reviewed and PeopleSoft for Human Resources, Financials and Student systems was selected. Central prototyping efforts took place in the Chancellor's Office to develop the CSU baseline software that was delivered on September 1, 2000.

CSU Chico's participation in the CSU system-wide CMS project included implementation of the PeopleSoft administrative information system suite consisting of Human Resources, Financials, and Student Information functions. In addition to administrative systems, other campus initiatives, labeled "Bridge" systems, were included as part of the campus implementation. These "Bridge" systems included licensing the Oracle suite of software, development of a campus portal, licensing Brio Broadcast Server for reporting from financials databases, bringing the financials data warehouse and student administration data warehouse to campus to manage, and a pre-applicant tracking tool, Sequitor for tracking prospective students.

CSU, Chico Vision

The CSU, Chico CMS project encompassed more than just the implementation of the system wide developed PeopleSoft deliverables. It also envisioned the continuing development and augmentation of the administrative systems, web, and data warehousing capabilities to support the educational mission of the university. The Project Charter, approved in 2001, stated: CSU, Chico intends to provide an environment and infrastructure where:

- All administrative functionality needed by a university faculty or staff member is available via a Web interface
- A student, faculty member, and/or staff member can service the majority of their own administrative needs via a simple, secure Web interface available at any time from any location
- Planning, decision support, reporting and other needed information is readily available via an easy to use reporting infrastructure which includes Web interfaces

Implementation Overview

Year 0 - 1999-2000

The first year campus leaders agreed that Chico would participate in the CMS Project. Planning and development began:

- Agreed to participate as 2nd-Wave campus
- Developed/implemented funding plan
- Identified finance, human resources, and student administration function team structure, and technical team structure
- Developed backfill staffing plan
- Hired project director

Year 1 - 2000-2001

Implementation efforts began with Financials and Human Resources modules. Chico implemented the newest version available (web-based) of the CMS software for Human Resources, and the latest available Finance version (client-based).

- Conducted fit -gap analysis and business process review
- Hired project manager, DBA, applications programmer
- Developed/implemented communications plan
- Built project room (MLIB 442) to house implementation staff
- Implemented backfill staffing plan
- Developed/implemented training plan
- Conducted campus readiness assessment with PeopleSoft Consulting Services
- Developed financials data warehouse model
- Began the implementation project

Year 2 - 2001-2002

Implementation of Financials and Human Resources was scheduled for approximately 18 months including training and fit-gap preparation. Implementation of the software began in September of 2001 and the first modules went live May 2002

- Conducted legacy data conversion
- Performed testing and developed reports
- Developed/implemented user training plan
- Financials go-live with Purchasing in May
- Implemented financials data warehouse and Brio desktop client

Additional “bridge” projects worked on during this time period

- Travel procedures and forms revamped
- New Telephone chargeback system initiated
- New Copy/print chargeback system initiated
- Year Round Operation (YRO)
- Portal – online grading/electronic roll sheets
- Technology Infrastructure Initiative (TII)

Year 3 - 2002-2003

The new CMS systems were fine tuned and the financials warehouse developed and was providing reporting capability. Implementation teams added functionality and planned for the Student Administration project and the Financials upgrade from client to web.

- Financials go-live with Accounts Payable and General Ledger in July
- Human Resources go-live with Administer Workforce and Faculty Recruit in July
- Began implementation of Base Benefits
- Developed Brio reports
- Campus functional CMS training on-going
- Planned for Financials 8.4 upgrade
- Planned for new financials modules, Asset Management, Accounts Receivable, Billing
- Planned for Student Administration implementation
- CMS student implementation began Oct with Academic Structure training for campus units

Year 4 - 2003-2004

Student Administration implementation and Financials 8.4 upgrade began

- Tech training updates and functional student administration training continued
- SA consultants on site part time beginning February 2004
- CMS Financials upgrade began August 2004
- Course Catalog renumbering project approved and implemented
- Base Benefits go-live
- Began implementation of Room Scheduling system (Ad Astra)
- Ad Astra classroom scheduling go-live in June

Year 5 - 2004-2005

Student Administration go-live by module. Financials v8.4 upgrade completed. Student Administration data warehouse built. New campus wide portal (uPortal) implemented to replace the Campus Pipeline portal that connected to legacy student administration systems.

- SA legacy conversions
- Course/Class and Bio Demo go-live in August
- Admissions go-live in October
- Financials v8.4 upgrade completed November
- Implemented student data warehouse (RDS), began building reports
- Student Records legacy conversion during December/January
- Financial Aid go-live in March
- Student Records/Registration go-live in April

- uPortal go-live in April, online student self-service registration
- Student Financials go-live for Fall in May/June
- 1st financial year end close in new system in July

Year 6 - 2005-2006

Completed implementation of the core Chancellors' Office identified modules in CMS.

- Advising go-live in August
- Student Financials legacy conversion in October
- Faculty self-service in uPortal go-live in December (grading in PS via web)
- Converted the majority of campus systems from the use of SSN to Chico State ID (PeopleSoft EMPLID)
- Pilot for Financials EPM data warehouse, go-live scheduled for summer 2006

Year 7- 2006-2007

CMS Central is scheduling the next round of upgrades for both Human Resources/Student Administration systems (HCM v8.9) and Financials v9.0. The HCM implementation is scheduled for an eight month implementation beginning August 2006 with go-live during spring break in March 2007. The Financials v9.0 upgrade has not been scheduled. Chico will also be implementing the SA EPM warehouse to replace the existing RDS warehouse and has been approached by CMS Central to pilot EPMv9.0.

- Planning, training, fit-gap, and upgrade team identification underway
- Implementation room refreshed and reconfigured for new teams
- Attending fit-gap and lessons-learned workshops from pilot campuses
- CMS Central technical upgrade team meeting in June to schedule upgrade passes
- Implementation begins August
- EPM warehouse development begins fall
- Upgrade cutover scheduled for March 16-26 2007
- Human Resources begins Absence Management/Leave Accounting implementation

Year 8 - 2007-2008

Financials v9.0 upgrade will be scheduled. Human Resources will begin implementation of the 21st Century Project (with State Controllers Office). Data warehouses will be integrated

CSU Chico CMS Implementation Summary

Completed CMS Central identified core HR/SA/FIN modules on schedule and under budget as follows:

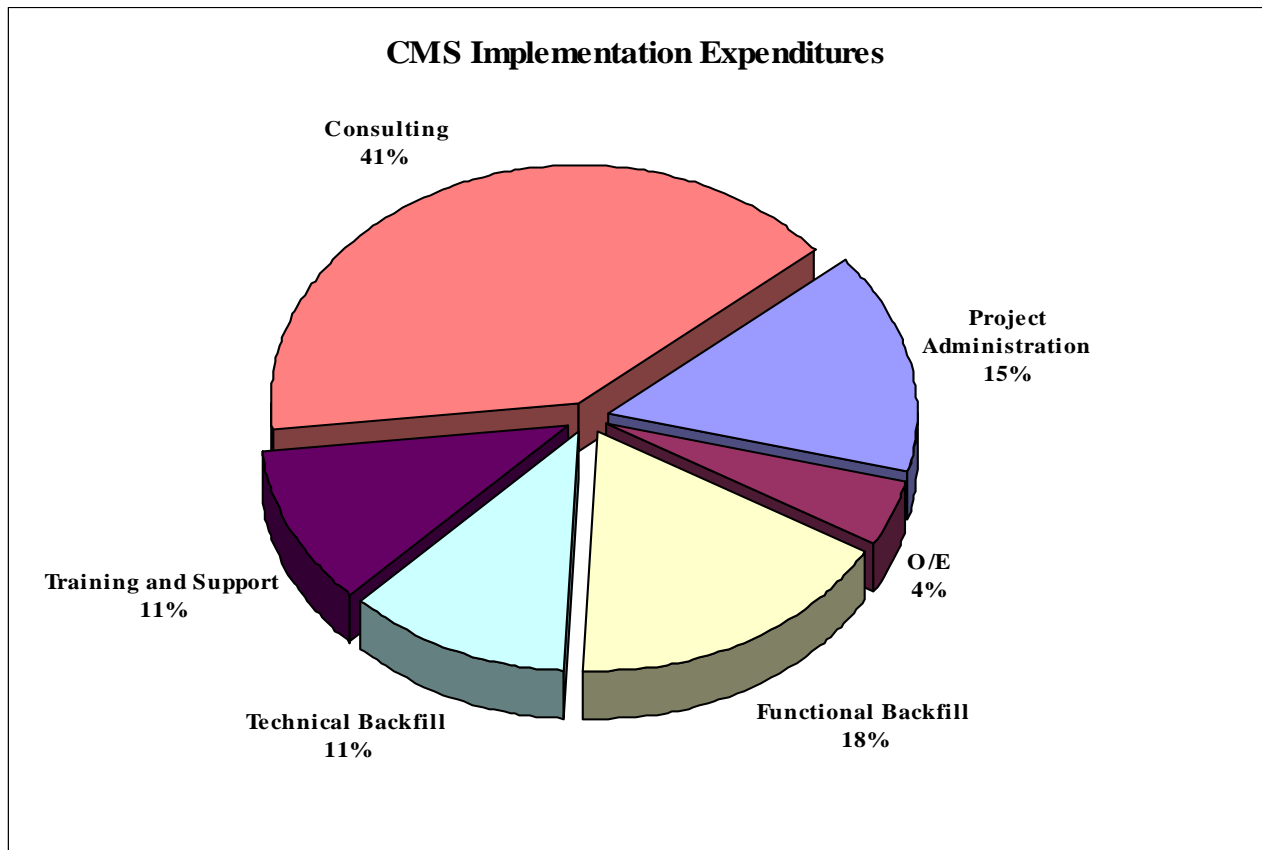
- **Human Resources**
 - ✓ Recruit Workforce
 - ✓ Administer Workforce
 - ✓ Labor Cost Distribution (LCD)/shared with FIN
 - ✓ Time and Labor
 - ✓ Base Benefits
 - ✓ Employee Self-Service
- **Student Administration**
 - ✓ Academic Advising/Transfer Credit
 - ✓ Campus Community
 - ✓ Student Records/Registration
 - ✓ Financial Aid
 - ✓ Student Financials
 - ✓ Student Self-Service
 - ✓ Faculty Self-Service
- **Financials**
 - ✓ General Ledger
 - ✓ Purchasing
 - ✓ Accounts Payable
 - ✓ Budget
 - ✓ Accounts Receivable
 - ✓ Billing
 - ✓ Asset Management
- **Reporting/Warehousing**
 - ✓ Financials v7.6 warehouse
 - ✓ HRSA warehouse – RDS
 - ✓ Campus on-demand-Brio Reporting
 - ✓ Financials EPM warehouse – pilot
 - ✓ HCM EPM warehouse -06/07

Success strategies for the CMS implementations included a consistent income stream which provided the flexibility to plan for spending peaks and valleys inherent in large enterprise resource planning projects. In addition, strong sponsor support resulted in excellent project functional and technical staffing as well as providing a campus climate for success. These factors contributed to lower campus implementation expenditures than projected gave the campus the ability to fund “bridge” projects that provided innovative and needed technology while awaiting functionality from CMS.

Implementation Costs

Campus implementation costs were projected through 2006 to include the core CMS modules required by the Chancellor’s Office. In addition to the core modules originally included in the implementation, Chico also upgraded the Financials suite from v7.6 to v8.4 and implemented an additional three financials modules (not included in the original projections).

2000-2006 Implementation Expenditures	Projected	Actual
Project Administration	\$1,523,006	\$1,337,427
O/E	\$195,812	\$373,470
Functional Backfill	\$1,892,380	\$1,565,587
Technical Backfill	\$988,766	\$1,014,605
Training and Support	\$2,865,835	\$979,762
Consulting	\$4,003,146	\$3,577,181
CMS Campus Implementation Totals	\$11,468,945	\$8,848,032



In addition to the campus expenditures noted above, other expenditures were required for the implementation of the PeopleSoft suite including CSU, Chico’s off-the-top share of the PeopleSoft software costs to the Chancellors’ Office, the Oracle campus licenses needed to run CMS software, and support and training costs mandated by CMS Central based on campus FTE. In reports to the Fiscal Affairs Committee these expenditures are noted as CMS mandated cost.

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CMS Campus Implementation Totals	\$11,468,945	\$8,848,032
CSU Mandated Costs (PS, Oracle, Support)	<u>\$4,622,923</u>	<u>\$5,145,432</u>
FAC Reported CMS Expenditures	\$16,091,868	13,993,464

