

**CAB Status
Report
September
2022**

Job Data Modernization

MONTHLY STATUS REPORT

Reporting Period

August 19– September 14, 2022

Prepared By

Anthony Rodgers

Current Status

On Track

• *Project Schedule*

Planning Phase	System Configuration	System Integration Testing	User Acceptance Testing	Project Go Live Date	Project Closure
Complete August 2022	In Progress September 2022	October 2022	Oct – Nov 2022	Jan 30, 2023	March 15, 2023

Accomplishments

- Completed communications plan
- Completed Project Plan and Schedule
- Created Job Data Modernization Project page via PeopleSoft Support
- Reviewed previous job data-related customizations and configurations
- Established environment for development and configuration
- Met with steering committee

In Progress

- Scheduling monthly steering committee meeting
- Organizing project kickoff event for district and department users
- Continuing configuration and demonstration videos of new features added the project page
- Working on project design document
- Documenting and creating system test use case scenarios

Next Steps

- Complete project kickoff event for district and department users
- Finalize new features system configurations and retroactive fits
- Begin system testing of use case scenarios
- Plan warranty plan of action and transition tasks
- Establish a district and department focus group
- Design training plan
- Solidify user acceptance testing dates and procedure

Risks/Mitigation

- Districts' lack of response and feedback – mitigation: continue providing constant updates and maintain engagement whenever possible
- Obtaining consensus of streamlined data entry procedures – mitigation: construct a focus group and maintain engagement
- Lack of participation in the User Acceptance Testing – mitigation: maintain district contact throughout the project; possibly record separate sections as a “follow along” guide
- End user time constraints based on various year-end activities – mitigation: provide multiple options for information/education sessions, training, and user acceptance testing dates/times.

Recruiting Adoption and District Deployment Phase

MONTHLY STATUS REPORT

Reporting Period

Prepared By

Current Status

August 19- September 16, 2022

Reesa Fickett

On Track

Project Schedule

Planning/ Prep	Business Process Mapping	Validation and Enhancements Development	Testing and Training	Go Live and Post Go Live Support	Closure
In Progress July - Aug 6 weeks	In Progress Aug - Sep 5 weeks	Sep - Oct 5 weeks	Nov - Jan 10 weeks	Jan - Mar 12 weeks	April 4 weeks

Accomplishments

- Conducted several meetings with vendors to finalize SOW for change management and business process mapping training.

In Progress

- Identifying audience for change management and business process mapping training.
- Reaching out to Districts to identify which Districts would like to participate and which resources they are committing to the project (including point-of-contact Change Management agent representing the district).

Next Steps

- Plan kick off meeting.
- Schedule 1:1 meetings with each District to begin mapping business processes and collection of information related to configuration and setup changes.

Risks/Mitigation

- Limited district participation in providing district current business process, meeting schedules commitment and UAT testing phase. We will need to coordinate with primary contacts in each district.
- Staffing changes at districts may require re-introduction to the project and additional training and support to get them up to speed. We will need to coordinate with primary contacts in each district.
- Districts may want customizations based on their own business process. We will be delivering a county-wide solution to best meet the needs of all districts.
- Changes to position management may impact more districts than just the Recruiting districts. More communication and training may be required.
- Districts may attempt to get other items outside of Recruiting resolved as part of this recruiting project. If a non-recruiting district brings forth an issue, we will have to conduct an analysis to determine if the issue is able to be resolved or is out of scope.
- Business process mapping resources have not yet been identified and are a critical component to the success of this project. Leadership is working on a vendor resource.

Warrant Printing

Utilizing PeopleSoft to print warrants rather than third-party software

MONTHLY STATUS REPORT

Reporting Period	Prepared By	Current Status
August 19- September 16, 2022	Chris Manese	On Track

Project Schedule

Requirement Analysis	System Design and Implementation	System Testing	System Deployment	System Maintenance	Project Close
Complete Feb 2 – Mar 1	Complete Mar 1 - Aug 8	In Progress Aug 9 - Present	Oct 13 - Oct 31	Oct 28 - Nov 28	Nov 29 - Nov 30

Accomplishments

- Gather all functional and technical requirements.
- Configure and setup report name and BI Publisher and SQR templates.
- Apply all necessary security features, MICR, font, signature, etc.
- FSCM and HCM pay cycle testing.
- CompOps MICR check printing.

In Progress

- Tax update testing for payroll and warrant printing

Next Steps

- Tatiana to make revised realignments (MICR account number) of all 3 warrants templates.
- Bruce to run HCM Payroll on/off cycle test with applied tax update/Series 13 warrant - pay003
- CompOps Warrant Volume Print Testing with check stock.
- Resubmission of Series 9, 13, 14 warrant samples to JP Morgan for final approval.
- System Deployment - Create communication plan, apply template configurations to production, GO-Live (TBD)
- System Maintenance - Report issues to ServiceNow.
- Project Close - Confirm all documentation and deliverables are complete. Review the successes, failures, and challenges of the project and identify opportunities for improvement.

Risks/Mitigation

- Formatting issue on BI Publisher and SQR template - mitigation: Have JP Morgan review warrant samples, make corrections and proper alignments if needed.

Correct History Wave 2

MONTHLY STATUS REPORT

Reporting Period

Prepared By

Current Status

August 19-September 16, 2022 (Week 6-9 of 15)

Sally Morton

On Track

Project Schedule

Plan, Design, Build	Test, CCB, Production Migration	Ticket Analysis, Training, Audit Queries	Pilot Working Session, OCM	Authorization Form Signoff, Go Live	Closure: Survey Lessons Learned Celebrate
Completed July - Aug 4 weeks	In Progress Aug - Sept 4 weeks	In Progress Aug - Sept 5 weeks	Sept -Oct 6 weeks	Nov 1 1 week	October - Nov 3 weeks

Accomplishments

- Completed integration testing

In Progress

- Reviewing and analyzing past correct history tickets in preparation for the review meeting
- Preparing for training sessions
- Researching audit queries for efficiencies and other improvements
- Working on the UAT testing effort

Next Steps

- Schedule the district ticket review meetings
- Successfully complete UAT testing and submit request to CCB for approval to migrate to production
- Conduct training sessions
- Begin the working sessions for assisting districts with their correct history ticket updates

Risks/Mitigation

- Availability of districts due to other higher priorities. Mitigation is to work closely with district resources to plan around important priority deadlines.
 - San Ysidro dropping out of Wave 2 due to the primary resource assignment to a 5-week jury duty case.

Feedback Tools:

Idea and Community Boards Software and Implementation

MONTHLY STATUS REPORT

Reporting Period

August 19- September 16, 2022

Prepared By

Uyen Quach

Current Status

On Track

Project Schedule

Research	Selection	Implementation	UAT and Training	Post Support	Closure
Completed August	In Progress September	October	November	December	January

Accomplishments

- Researched and reviewed Idea and Community Board software in the market
- Presented 2 products for feedback tools/Boards to CAB (Aha! And IdeaNote)
- Consulted with Info-Tech on other products
- Finalized the requirements for PeopleSoft team

In Progress

- Formulating use cases and questionnaires for the vendor evaluation and selection process
- Finalizing vendor list.

Next Steps

- Meeting with the selection committee
- Send questionnaires and use cases to vendor

Risks/Mitigation

- None that this point

Sweetwater GL/KK Integration

Monthly Status Report

Reporting Period

Prepared By

Current Status

August 19- September 16, 2022

Rico Edillor

On Track

Project Schedule

Planning Phase	System Configuration	System Integration Testing	User Acceptance Testing	Project Go Live Date	Project Closure
In Progress Aug 1-Sep 30	October 2022	October 2022	Feb. - March 2023	March 1 2023	July 30 2023

Accomplishments

- SDCOE granted access to Sweetwater staff to be able to run FIN queries in PeopleSoft project environment
- SDCOE provided Sweetwater staff with URL link to PeopleSoft FIN environment for the project
- SDCOE Identified list of public queries for Sweetwater to use in reconciling INFOR/PSoft chartfield values
- SDCOE shared the fee schedule with Sweetwater and provided finalized number for Memorandum of Understanding (MOU)
- Sweetwater provided the names/ID number of staff to be given access to PeopleSoft FIN who will be running queries

In Progress

- SDCOE Working with Sweetwater staff to hold a working session in running queries in PeopleSoft
- Sweetwater meeting with Infor to discuss chartfield values evaluation and mapping
- Sweetwater working with School Board for MOU approval
- Sweetwater mapping out project timeline to share with SDCOE

Next Steps

- SDCOE to share project timeline template to Sweetwater
- Sweetwater to provide SDCOE with a date for working session to walk through running queries in PeopleSoft
- Sweetwater to reconcile and synch chartfield values between Infor and PeopleSoft systems
- Sweetwater to provide result of chartfield reconciliation to SDCOE
- Sweetwater to add/update chartfield values in PeopleSoft to synch it up with Infor system
- Sweetwater to inform SDCOE when ready for integration testing after chartfield reconciliation/validation

Risks/Mitigation

- To meet the integration testing date, chartfield values between the two systems must first be reconciled. This will take some time to accomplish and may not meet the testing window of October if not done sooner. Sweetwater to hold an internal meeting to discuss plans in reconciling chartfield values and roll up.
- Project timeline must be mapped out soon for the project to meet target deadlines for integration and UAT testing.