

Project Charter

Project authorized by Beckie Benson on October 29, 2021

I. Project Name

Project Name PeopleTools 8.58 Upgrade	Start Date July 2021	End Date Feb 2022
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II. Project Organization

Indicate all project team members and how frequently you will communicate with them.

<p>Project Manager Oversees the project work plan; reports on status; leads project team that is responsible for achieving the project objectives</p> <ul style="list-style-type: none"> Reesa Fickett 	<p>Sponsor The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project</p> <ul style="list-style-type: none"> Terry Loftus Beckie Benson
<p>Steering Committee Key people that assist the project manager in making decisions and moving the project forward</p> <p><input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input checked="" type="checkbox"/> As Needed</p> <ul style="list-style-type: none"> Andy Esserman Steve Clark Rick Roberts Terry Loftus Beckie Benson William Pickering Jon Guertin Mariteza Diaz 	<p>Stakeholders An individual, group, or organization that may affect or be affected by outcome of the project</p> <p><input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input checked="" type="checkbox"/> As Needed</p> <ul style="list-style-type: none"> External: <ul style="list-style-type: none"> All districts that use PeopleSoft All external systems interfaces users Internal: <ul style="list-style-type: none"> ITS/ERP System Administration ITS/PeopleSoft Support All District 99 PeopleSoft Users
<p>Project Team Supports the project manager in performing work of the project to achieve its objectives</p> <p><input checked="" type="checkbox"/> Daily <input checked="" type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input checked="" type="checkbox"/> As Needed</p> <ul style="list-style-type: none"> Core Team: Jim Collis, Shauna Stark, Taryn, Tatiana, Steven Clark, Anthony, Rico Extended Team: ITS Development, ITS QA/Testing, PeopleSoft Support Team, Sally Morton SDCOE Representatives: Andy Esserman Outside Representatives: CRT – Chung Pi 	<p>Others Involved List anyone else who will be involved and state their roles</p> <p><input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed</p> <p>District Focus Groups on UI Navigation & Home Pages:</p> <ul style="list-style-type: none"> HR/Recruiting Focus Group Payroll Focus Group Finance/AP Focus Group Purchasing Focus Group Other

III. Project Details

Project Description

Write a brief description of this project in simple, easy-to-understand terms. What are you trying to accomplish? Why?

The objective of this project is to install PeopleTools 8.58 into all current SDCOE PeopleSoft environments. The current version of PeopleTools is 8.57.

PeopleTools is the core underlying technology supporting all PeopleSoft functions and activity. SDCOE maintains PeopleTools at current vendor-supported levels. PeopleTools 8.57 primary support stops at the end of 2021. In order to present a fully supported PeopleSoft environment, it is critical to keep PeopleTools at current supported versions.

Tools 8.58 has many significant improvements in security, user presentation, ease of maintenance, system performance, reporting, lifecycle management, usability, etc. Our primary initial focus will be user presentation via the Portal and security enhancements.

Oracle has moved PeopleSoft towards the more modern FLUID user interface over the last years, and away from the Classic user interface. With this release of Tools, Oracle has depreciated support for Classic navigation methods and has stated they will only support FLUID navigation methods with fixes, enhancements, etc. SDCOE's current portal design is based on the older user interface. This Tools 8.58 update will require SDCOE to adapt its portal to the new FLUID interface.

SDCOE has undertaken the implementation of the Recruiting module. Tools 8.58 will provide significant changes and improvements that directly impacts the Recruiting module.

Our primary goals for this project can be summarized as:

- Successfully install PeopleTools 8.58 into all SDCOE environments
- Develop and deploy a Fluid-based navigation strategy, including unified Portal navigation, that provides a positive, functional way for our customers to interact with PeopleSoft.
- Support the Recruiting Project and other SDCOE initiatives.

Scope

Who/how many this will impact? What is included (or not included) that can help manage the expectations?

This project has the following impacts:

- The internal user Portal will be significantly revised and updated.
- Security enhancements will allow better protection of PII via selective data masking.
- Small but important improvements for user functionality such as the New Window feature and run control management will enhance the user experience.

This project impacts all internal teams at SDCOE, including the PeopleSoft Support Team, Enterprise Applications Operations (System Admin, Testing, Dev) and 099 business users.

In scope:

- Analysis and development of the ESS Portal and Internal Portal, plus unified navigation to meet Fluid requirements of Tools 8.58.
 - Remove all non-fluid customization for navigation and rebuild using fluid navigation
- Analysis and development of the current Notification methodology to support FLUID techniques in Tools 8.58.
- Any retrofitting or configuration changes to support the new release
 - Remove any customization on the portal and return to delivered portal product
 - Use delivered Tiles and Navigation; Where needed, clone the delivered and customize SDCOE Tiles and Navigation
 - Deliver Tiles with no performance issues
 - Determine the extent of technical changes, make required changes
 - Determine the extent of functional changes, make required changes
- Any necessary security changes to support the new release
- Enable security to allow for effective customization of home pages
- Development necessary to support the Recruiting project.
 - Determine which components of Tools 8.58 are required for Recruiting project, include in Tools project

- Discovery of impact of new user enhancements in tools such as run control management and development tools enhancements
- Select appropriate configuration changes and user enhancements that will be included in the Tools 8.58 project
- Ensure that pages that have a new fluid analog are no longer available via the navigation bar

Out of scope:

- Actively looking to replace classic pages and navigation centers with their FLUID analogues, unless required.
- Major architectural changes (hardware, security, navigation, etc.).

Objectives/Success Criteria

How will you know if the project was a success? List what you are trying to accomplish and the success criteria.

1. PeopleTools 8.58 installed in a timely, successful manner.
2. Portal Navigation converted to the supported FLUID based navigation methods in a manner that users find useful and appealing.
 - a. Users feel they were a part of the process and involved in key decision points
3. SDCOE applies a more granular security model for ESS external user login, queries and other critical pages.
4. SDCOE can more efficiently maintain and implement improvements in the base system while continually improving the user experience and ease of use.
5. Documentation and training are provided in a manner that makes users feel confident in their ability to continue to work in the system.

Goals Alignment

With which Board Goals and ITS Goals does this project align?

- | | |
|--|---|
| <input type="checkbox"/> #B1 Connect the educational experience to the world of work | <input checked="" type="checkbox"/> #ITS1 Maximize Customer Success |
| <input type="checkbox"/> #B2 Provide educational opportunities and supports to SDCOE schools and school districts | <input checked="" type="checkbox"/> #ITS2 Deliver Value: Applications & Systems |
| <input type="checkbox"/> #B3 Become the leader and model for innovation | <input checked="" type="checkbox"/> #ITS3 Improve Division Efficiencies |
| <input checked="" type="checkbox"/> #B4 Maximize human and operational resources to strengthen the organizational culture of SDCOE | <input checked="" type="checkbox"/> #ITS4 Be the Cybersecurity Solutions Leader |

Deliverables

Which products or results do you expect upon completion of the project?

- New Portal and ESS Landing page with FLUID Navigation.
- New Home page with FLUID Navigation Manager Self Service (MSS)
- New Home pages with FLUID Navigation for Focus Areas (HR/Recruiting, Finance/AP, Purchasing, Payroll, Others)
- Certify Tiles for SDCOE utilization/tile library – with no performance issues
- Updated Notification methods to eliminate current work-around
- Any necessary updates to existing customizations to accommodate direct deposits for off-cycle checks.
- New queries and/or reports to support new functions.
- Updates to business processes to support new functions.
- Updates to existing documentation, such as technical documentation and user guides.
- A Rollout plan.
- A communication plan.
- A support plan.

Assumptions

What can be assumed about this project?

- Organizational change management will be critical to help users become comfortable with the new look and feel that will be found on the Portal and many functional pages.
- Extensive testing will be required.
- Development discovery will probably bring forth additional impacts.
- Past Tools deployments have had un-anticipated impacts. We can anticipate that discovery may result in some changes to scope and deliverables.

Risks

List the things that you think could be risks to the success of the project. If possible, list the mitigation strategy for each risk.

- Additional changes may be required due to potential downstream requirements for database and operating systems upgrades.
- The effort and scope of the navigation changes cannot be determined until PeopleTools 8.58 is installed into a development environment. Discovery and preliminary development may challenge our schedule assumptions.
- Project timing and cross-dependencies are in flux: Some issues may arise due to the need of other projects such as recruiting to make use of 8.58 elements.
- Past PeopleTools releases have included changes to security roles and permissions lists that have had an impact on SDCOE user security.
- Development activities may stress current staff experience

IV. Project Schedule & Milestones

Based on your needs, list either the phases and/or major milestones of the projects. Include start and end dates.

Phase/Major Milestone	Responsible (Lead)	Start Date	End Date
Analysis Analysis and Discovery: Install an updated demo into SDCOE servers with latest PUM and PeopleTools 8.58. Install Tools 8.58 into the G development environments Identify and document all use cases Identify and document to-be process	Jim Collis Steve Clark	May 2021	November 30 2021
Development Prototype the Portal Changes Apply any necessary retrofits Develop enhancements and update existing processes as necessary	Jim Collis Steve Clark	May 2021	November 30 2021
Testing Identify and document test cases Coordinate testing across departments and organizations Execute all test plans and scripts Send corrections back to development as necessary UAT	Shauna Stark	October 2021	December 2021
Training Update user guides Develop job aides and training videos Give Districts time to update their documentation as well	Barbara Thiss	October 2022	February 2022
District Communication Develop communication plan for districts	Sally Morton	November 2021	February 2022
Deployment Get approval for changes through CCB Deploy changes to production, in coordination with the Recruiting project Follow up on communications with districts	Jim Collis	January 2022	February 2022

Phase/Major Milestone	Responsible (Lead)	Start Date	End Date

V. Tools

<input checked="" type="checkbox"/> Monday.com	If Yes, which board? _ https://sdcoe-its.monday.com/boards/787767716/ Do any new members need to be added? _____
<input checked="" type="checkbox"/> Microsoft Teams	If Yes, which team/channel will you use? _____
<input checked="" type="checkbox"/> OneDrive	If Yes, whose OneDrive, and what is the folder named? _____
<input checked="" type="checkbox"/> SharePoint Site	If Yes, which site, and what is the folder named? _ https://sdcoe2.sharepoint.com/:w:/r/sites/PeopleSoft/_layouts/15/Doc.aspx?sourcedoc=%7BF6C1103D-2ECF-4E09-9D48-3C628EE97CD0%7D&file=ProjectCharter_Tools_858_v2a.docx&action=default&mobileredirect=true
<input type="checkbox"/> Other	

Additional Items to Plan

- **Project Budget:** Estimate the cost of the project.
- **Communication Plan:** Identify all critical communication channels for project stakeholders, frequency of communication, types of information to be communicated, and method of regular communication.
- **Tracking and Status Updates:** Identify the methods the project team will use to regularly update the project status including methods of tracking project progress and which organizational stakeholders receive notification of project status.
- **Training Plan/Documentation Plan:** Identify any necessary training and documentation for project stakeholders, including content, delivery method, etc.
- **Project Close Out:** Determine the final actions/steps to close out the project. Examples include sign off documentation, lessons learned meetings and documentation, surveys/evaluations, and a celebration and/or acknowledgement.

Appendix: Notes regarding PeopleTools 8.58 Enhancements

General Notes

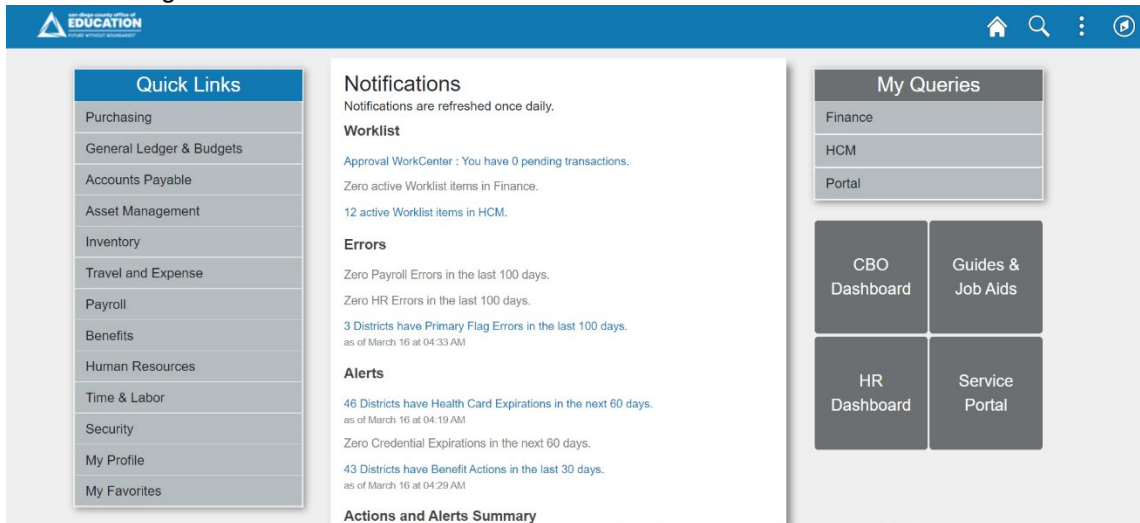
- PeopleSoft 8.58 tools has significant technical and functional improvements that will have a positive impact on our user community.
- Tools 8.58 significantly improves security with data masking features for both Query and PIA users. This can help with securing PII.
- PeopleSoft's Job Record and Personal record re-engineering efforts require Tools 8.57.11 or newer. PeopleSoft recommends Tools 8.58. Major PUM updates to these areas will be increasingly dependent on Tools 8.58.
- Talent Acquisition Manager (HCM) release 034 included an Application Details dashboard created using Kibana Analytics. This dashboard is available in the Recruiting Homepage and Recruiting Insights dashboard to provide customers the ability to visualize the application data. Selective adoption would allow us to include this in the Recruiting project, but this requires Tools 8.58. (Bug Id 30926019)

PeopleSoft FLUID

- SDCOE does not fully deploy PeopleSoft's FLUID interface at this time. Most of the current navigation and deployed pages are either Classic or Classic-Plus pages and navigation styles.
- PeopleSoft is increasingly deprecating the older user interface (Classic and Classic-Plus). New functionality is almost exclusively being supplied in the FLUID version of a given function within PeopleSoft. Some of the major considerations associated with this upgrade are outlined below:
 - Support for Non-FLUID pages and code continues to diminish. FLUID pages get "First Dibbs" on fixes and enhancements. See "Lifetime Support Summary for PeopleSoft Releases (Doc ID 2238983.2)"
 - PeopleSoft 8.58 eliminates support for the older navigation methods within menus and applications. All Navigation methods going forward are FLUID. Conversely, SDCOE currently does not have FLUID fully enabled in any of the PeopleSoft systems. Non-FLUID Pages (Classic/Classic Plus) are not being eliminated but the navigation used to reach all pages—including Classic pages—will be through Fluid navigation methods like Tiles, Home Pages, Fluid Navigation Collections, Global Search, and the Nav Bar. The following are features of Classic navigation that will no longer be supported:
 - Breadcrumb feature found in portal header
 - Persistent Search Results presented through the breadcrumb feature
 - Any Classic Menu Pagelet typically found on Classic Homepages or Portal Templates.
 - Delivered Portal Headers, Portal Templates, and Branding Themes that enable the breadcrumb feature or Menu Pagelet.
 - Apps-Based Navigation (aka Smart Navigation – previously deprecated in PeopleTools 8.55)
 - See "Tech Update – PeopleSoft to Drop Support for Classic Navigation" (Doc ID 2585909.1) and support doc "Desupport of Classic/Classic Plus Pages in PeopleSoft 9.2 (Doc ID 2238983.2) for more details.
 - The UI/UX work completed in Dec 2018 relies on a customized approach that provides a FLUID-like UI without utilizing full FLUID functionality within PeopleSoft. This customization is not sustainable and needs to be replaced by PeopleSoft delivered tools/features. This will also make future upgrades simpler.
 - Many of the earlier SDCOE issues and/or drawbacks to FLUID adoption have been removed or greatly mitigated with 8.58. Features such as "New Window" function in FLUID will make adoption easier.

The Landing Page: Look and Feel

- Many users have expressed positive remarks about the current SDCOE unified navigation model. A primary goal of our conversion to FLUID must be to ensure that the user experience is not diminished by the switch. SDCOE should strive to build on this positive user acceptance garnered by the UI/UX project.
- The current Portal Landing page is based on older PeopleSoft Classic design elements and tools. This is shown in image below:



- The new landing page will utilize a FLUID design style that incorporates Tiles and FLUID work centers similar to the illustration below:



- Visually this is a big “look and feel” change, but it should not be result in a significant change in functionality. The customized nature of the current SDCOE landing page means that a Tools 8.58 upgrade is likely to “break” existing functionality. It will be up to the development team to review necessary changes in order for the upgraded FLUID landing page to fully meet our customer’s expectations.

- The Notification Center is a workaround compromise that is changed significantly with the Tools update. The current version relies on a clumsy combination of multiple jobs that clear and reset the notifications once daily. The new version should be much more dynamic with real-time updates.
- Adequate time must be allocated for training materials and user guides to be updated. Functionality will not change but since the look and feel will, existing user guides and training materials will require updating.

Misc Notes

PeopleTools 8.57 key milestone dates:

- Released by PeopleSoft on September 2018 (Cloud).
- Installed in SDCOE on Dec 2019
- General Patch Updates through: December 18, 2020
- Date CPUs Delivered Through: January 2022
- Note: The GPU date is the date that Oracle ensures critical patch delivery. After that date, Oracle will not guarantee patches for critical support issues. Doc ID 2238983.2

PeopleTools 8.58 key milestone dates:

- PeopleTools 8.58 was released in Dec 2019.
- Date CPUs Delivered Through: TBD
- Tools 8.58 Most Current Release: 8.58.11 (released 04/09/2021)

PeopleTools 8.59 key milestone dates:

- Tools 8.59 was released for OCI clients (Cloud) as of 04/09/2021.
- The on-premise release is expected in about 3 months.

Product Support Matrix		
COMPONENT	ADDED	DISCONTINUED
Server Operating Systems	Windows Server 2019	Windows 2012 R2
Mobile Operating Systems	Safari iOS 12, 13 Chrome for Android 9, 10	Safari iOS 11 Chrome for Android 7
Desktop Browsers	Firefox 68.3 ESR, 71 RR Chrome 79 Edge 44.18362 Safari 12, 13 (Mac OSX)	Firefox 60 ESR, 62 RR Chrome 69 Edge 42.17134 Safari 10.1 (Mac OSX)
RDBMSs	MSS 2019 Oracle 19c	MSS 2012, 2014 DB2 LUW (All Versions)
Application Servers	Tuxedo 12.2.2.0.0 (Visual Studio 2017)	NA
COBOL	Micro Focus Visual COBOL 4.0	IBM COBOL for AIX 5.1, 5.2 Micro Focus Net Express (All Versions) Micro Focus Server Express (All Versions)
Enterprise Manager	EM 13.4.0.1	NA
Oracle Policy Automation (OPA)	NA	OPA (All Versions)
Search	Elasticsearch 7.0 Kibana 7.0 Logstash 7.0	Elasticsearch 6.1.2 Kibana 6.1.2
Other	CKEditor 4.11.2	CKEditor 4.5.2