

PBCS Wave 3

MONTHLY STATUS REPORT

Reporting Period

February 24- March 24, 2023

Prepared By

Wendyl Aban

Current Status

On Track

Project Schedule

Planning	Development	Testing	Closure
Completed Oct 27, 2022	Completed Mar 10, 2023	In progress Apr 15	May 1, 2023

Districts involved in Wave 3:

- New
 - Rancho Santa Fe
- Adopting
 - San Dieguito
 - Solana Beach

Accomplishments

- Rancho Santa Fe is fully configured and is ready for district use
- San Dieguito has been fully trained and is currently in budget preparation.
- Solana Beach has been fully trained
- 2 enhancement requests have been signed off by the requesting districts
- 1 enhancement request was cancelled due to system configuration

In Progress

- 4 enhancement requests are ready for district demos and signoff
- 1 enhancement request is ready for ITS internal group review
- Bi-Weekly Office Hours to support districts with budget preparations and troubleshooting

Next Steps

- District Enhancement Request Signoff

Enhancement Request Status

Enhancement Request	Status
INC0072184 Need option to change between fiscal years	4/4 - District demo.

INC0074443 Salary Schedule Import set for	3/6 – Migrated to all environments including production
INC0072948 - P099-Medical Dental compensation element	1/25 – Cancelled Met with Innofin and district to review setup instructions. Innofin determined this can be accomplished through configuration. District confirms that this setup will meet their needs.
INC0082849 – H&W Budgeting for Part Time employees	3/28 - District would like to move the code from the Position Default cluster to the Other Compensation Admin cluster. Innofin asked about this effort. 3/28 - District demo.
INC0073295 - Accommodate our PARS calculation	3/24 - Migrated to all environments including production
INC0074565 - Exception Hourly Step Advance Calculation	3/28 - District identified a discrepancy in the calculation of the annual salary. Needs to be investigated with Innofin. 3/28 - District demo
INC0078871 - Report to be created that will show positions/employees that have multiple allocations to the same account string	3/28 - Ready for internal SDCOE ITS group review
INC0071256 - Department User Advanced need ability to enter Revenue	3/27 - District requested that ER be migrated into sandbox for their own testing. 3/27 - District demo

Recruiting Adoption and District Deployment Phase

MONTHLY STATUS REPORT

Reporting Period

Prepared By

Current Status

February 24- March 24, 2023

Reesa Fickett

On Track

Project Schedule

Planning/ Prep	Validation and Enhancements Development	Business Process Mapping	Testing and Training	Go Live and Post Go Live Support	Closure
Complete July – Aug 6 weeks	Complete Oct - Jan 18 weeks	In Progress Jan-April 6 weeks	TBD	TBD	TBD

Accomplishments

- Between **2/24 - 3/24** we have conducted **30 hours** of Business Process Mapping sessions and created **over 40** Business Process maps

In Progress

- Wrapping up 10 hours of "As-Is" Business Process Mapping with all 9 Districts
- Creating Business Process Maps (BPM) for each business process
- Creating change analysis documentation to support each district
- Configuring 2 new districts: Escondido and La Mesa Spring Valley

Next Steps

- Complete Business Process Mapping sessions
- Conduct future state "To-Be" sessions and change management
- Identify training needs

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.

Addendum

- Status of AS-IS Business Process Mapping deliverables:

Deliverables to Districts	Alpine	Encinitas	Escondido (NEW)	Grossmont	La Mesa (NEW)	Ramona	Solana Beach	South Bay	SDCOE	% Complete
AS-IS: Add Update Position	N/A	N/A	Done	N/A	Done	N/A	Done	N/A	N/A	100%
AS-IS: Create Job Opening, Job Posting, Approval process	Done	Done	Done	Done	Done	Done	Done	Working on it	Working on it	77%
AS-IS: Testing and Screening of Applicants	Done	Done	Done	Done	Done	Done	Done	Working on it	Not Started	77%
AS-IS: Interviewing of Applicants	Done	Done	N/A	Done	Done	Done	Done	Working on it	Not Started	77%
AS-IS: Prepare Job Offer and Pre-Boarding	Done	Done	Done	Done	Done	Done	Done	Working on it	Not Started	77%
AS-IS: Prepare for Hire and On-Boarding	Done	Done	Done	Done	Done	Done	Done	Working on it	Not Started	77%
Capturing of Current State Analysis (Word Doc)	Working on it	Working on it	Working on it	Working on it	Working on it	Working on it	Working on it	Working on it	Working on it	0%

AP_ACH Project

MONTHLY STATUS REPORT

Reporting Period

February 24-March 24, 2023

Prepared By

Rico Edillor/ Sai Sundar

Current Status

On Track

Project Schedule

Planning Phase	System Configuration	System Integration Testing	User Acceptance Testing	Project Go Live	Project Closure
	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023

Accomplishments

- Held working session with core team to discuss the collection and management of supplier W9/TIN information to existing supplier records already in the system.
- Created a document to be discussed with sponsor on next steps for the W9/TIN collection and management
- Met with developer to discuss progress of the bank routing number validation custom process
- Reviewed current supplier portal registration functionality with regards to the use of supplier W9/TIN information.

In Progress

- Meeting with Operations group to discuss testing of bank routing number validation custom process
- Meeting with core team to evaluate the electronic collection of supplier W9/TIN information
- Writing testing plan for the custom bank number validation process

Next Steps

- Perform testing of the custom bank routing validation process
- Resolve any issue encountered during the testing of bank routing number validation custom process
- Retest supplier bank routing number validation custom process (once issue is fixed)
- Meet with core team and operations group to review testing result of the custom supplier bank routing number validation process.
- Meet with project sponsor to go over result of bank routing number validation custom process testing.
- Seek approval if custom bank routing number validation custom process can be migrated to FIN Prod
- Finalize scope of the project charter
- Update project activity document
- Get approval for project to move forward

Risks/Mitigation

- The new requirement for collecting W9/TIN electronically will impact project timeline and go live date. Prioritize project activity so as not to heavily impact district's year-end activities.
- The current business process will have to change to accommodate the electronic collection of supplier W9/TIN information. Prepare a comprehensive change management plan to provide enough information to parties being affected.
- All training materials and job aids will require the addition of new functionality. Ensure to give the training team enough notice to incorporate changes before training is scheduled.

Feedback Tools:

Idea and Community Boards Software and Implementation

MONTHLY STATUS REPORT

Reporting Period

February 24- March 24, 2023

Prepared By

Uyen Quach

Current Status

On Track

Project Schedule

Research	Selection	Implementation	UAT and Training	Post Support	Closure
Completed Dec 30, 2022	In progress Apr 30, 2023	May – June 2023	July 2023	Aug 2023	Sept 2023

Accomplishments

1. Conducted vendor demonstrations for 4 vendors
 - a. Aha! Ideas
 - b. IdeaNote
 - c. InVision Community
 - d. UseRespose
2. Met with the selection team and selected top 2 vendors to move forward with POC
 - a. InVision Community
 - b. IdeaNote
3. Set up IdeaNote POC environment
4. Set up bi-weekly meetings with selection team to review the POC progress
5. Requested for sample sites and references from the 2 vendors

In Progress

1. Collecting use cases for POC

Next Steps

1. Conduct POC sessions with the 2 vendors
2. Contact references

Risks/Mitigation

Regulatory Updates: Tax Updates

MONTHLY STATUS REPORT

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Current Status

February 24- March 24, 2023

Bruce/Rahm

On Track

Tax Update Project Schedule

Tax Update (A) Initiation and Planning	Tax Update (A) Development and Testing	Validation and Enhancements Development	Testing and Training	Go Live and Post Go Live Support	Closure
Complete January 2023	In progress February 2023 – April 2023	N/A	In progress March – April 2023	April – May 2023	

Accomplishments

- Worked with CherryRoad to obtain Tax Update 23-A
- Compare Reports completed and reviewed

In Progress

- Development work is underway

Next Steps

- Testing (March/April)
- Deployment

Risks/Mitigation

Encumbrance Short Term

MONTHLY STATUS REPORT

Reporting Period

Prepared By

Current Status

March 2023

Jeff Collum

On Track

Project Schedule

Planning/ Prep	Documenting	Initial Development	Dev, Testing and UAT	Go Live and Post Go Live Support	Closure
Complete 2-6-2017	Complete 2-28-2018	Complete 6-13-2019	In Progress 4-12-2023	4-18-2023	

Accomplishments

- Iteration 7 testing / validation completed.
- Invite sent to districts to join User Acceptance Testing (UAT).

In Progress

- Iteration 8 testing / validation.

Next Steps

- Complete Iteration 8 testing / validation.
- UAT with Districts. As of 3-23-2023, 10 districts confirmed to participate in UAT. Meeting with districts Scheduled for 4-5-2023.

Risks/Mitigation

- New issues and development time to resolve.

ESS Direct Deposit Transaction using Multi Factor Technology

MONTHLY STATUS REPORT

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Prepared By

Current Status

February 24- March 24, 2023

Bruce/Sai

On Track

Project Schedule

Planning/ Prep	Business Process Mapping	Validation and Enhancements Development	Testing and Training	Go Live and Post Go Live Support	Closure
Completed Jan 2023	Completed Jan 2023	Completed Feb 2023	Completed Feb 2023	Completed March 2023	Completed March 2023

Accomplishments

- Completed Design and Development on the project items.
 - Integration with Twilio for text/call base two factor authentication.
 - Custom screen to complete MFA from within Employee Self-Service (ESS) direct deposit screen.
 - Verbiage changes to ESS direct deposit screen.
 - Make MFA contact number and email ID mandatory to make changes to banking information from within ESS direct deposit screen.
 - Lock down ESS direct deposit screen for 30 days if changes are made to MFA contact phone from within ESS contact details.
 - Masking of PII data elements from ESS contact details.
 - Allow capability to add MFA contact phone number from within ESS contact details.
 - Make employee email ID mandatory for making changes from with ESS contact details.
 - Add more descriptive verbiage to the email notifications for any ESS contact changes.
 - Unlock user access to ESS direct deposit after the 30 days lockout period.
- Complete unit testing and system testing of various project items.
- Complete deployment of an initial phase of the project which would allow users to add MFA contact phone numbers without being locked out of ESS direct deposit screen. This went live on 01/30/23.
- Develop reports to summarize employee registration of MFA contact phone by school district.
- Make changes to the end-user training documentation, user guides and any videos to accommodate the new functionalities implemented.
- The complete project with all the in-scope items was deployed in production on 03/06/2023.
- Provide post-production support as needed.

In Progress

- Production support is provided as needed.
- Reports are provided to show ESS contact MFA phone registration and ESS direct deposit changes, as needed.

Next Steps

- Derive a methodology for district users to create and use PeopleSoft queries to report on employee contact details and banking details without exposing PII & sensitive data elements. This would eliminate risks associated with providing access to PII & sensitive data fields from within PeopleSoft queries.

- Perform analysis on components/screens in PeopleSoft outside of ESS where employee contact and banking information is available. Take steps to limit exposure to such PII/sensitive data fields from PeopleSoft screens outside of ESS.
- These tasks can possibly be tracked as separate security enhancement projects.

Risks/Mitigation

- There is exposure for users outside of ESS to employee personal/sensitive information. Analysis is being done on the steps that can be taken to mask such information from within PeopleSoft.

TLS Planning

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February 24– March 24, 2023

Prepared By

Andrew and Beckie

Current Status

On Track

- **Project Schedule**

Planning Phase	System Config	Unit / System Integration Testing	User Acceptance Testing (UAT)	Fixes / Config Updates	Training/ Final UAT	Project Go Live Date	Project Closure	
In Progress Mar – May 2023	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD

Accomplishments

- Assignment of Jay Vallamdas - to lead the project

In Progress

- Review of original Business Case
- Review of CAB and Health Check recommendations
- Initial scope discussions

Next Steps

- Create Project Charter
- Define Steering committee
- Start the RFP process
- Start the MOU District Template

Risks/Mitigation

- Timing related to Esser funding
- Resource and time commitments with the districts

Retro Report

MONTHLY STATUS REPORT

Reporting Period

February 24– March 24, 2023

Prepared By

Andrew Esserman
Rahm Noury

Current Status

On Track

- **Project Schedule**

Planning Phase	System Config	Unit / System Integration Testing	User Acceptance Testing (UAT)	Fixes / Config Updates	Training/ Final UAT	Project Go Live Date	Project Closure
Complete	Complete	Complete	Complete	Complete	March 30, 2023	April 8, 2023	

Accomplishments

- Development of Report is complete

In Progress

- Research and development of a data issue is in process
- District review and testing in progress

Next Steps

- Finalize the solutions for the open issues
- Get final sign off

Risks/Mitigation

- Underlying data issues affecting the report may require data clean up

2023 PeopleSoft Conference (March 8 - 9, 2023)

"Charting the Course In A Brave New World"

MONTHLY STATUS REPORT

Reporting Period

Prepared By

Current Status

February 3 - February 17, 2023
(Week 40 of 43)

Barbara Thiss

On Track

Project Schedule

Initiation Planning & Prep	Kickoff Session Planning & Sched setup	Registration & Session Development	Final Preparations	Conference Go Live	Closure
Completed June - Aug 2022 3 months	Completed Sept - Dec 2022 4 months	Complete Jan - Feb 2023 2 months	Complete Feb 13 – Mar 7 4 weeks	Complete Mar 8 – Mar 9 2 Days	In Process Mar 10 – Mar 31 3 weeks

Accomplishments

- Delivered a 2-day virtual PeopleSoft Conference with 40 sessions.
- Completed SCHED conference page.
- Developed 40 PPT presentations to present. Converted PPTs to PDF and posted on SCHED for attendees to access.
- Sessions presented by both SDCOE PeopleSoft Teams and district system's experts.
- Inspired 614 people to register for the conference.
- Sent out conference survey announcement to attendees. Due 03/17/23.
- Sent email out for lessons learned survey to Presenters & Moderators. Due 03/16/23 at noon.
- 40 session recordings including closed captioning and posted to SCHED.
- Had fun!

In Progress

- Compiling attendance for the entire conference as well as each session.

Next Steps

- Conduct Lessons Learned for Project Team
- Plan and deliver Celebration on 03/28/23.
- Analyze survey results.
- Share session feedback with presenters.
- Complete Executive Summary.

Risks/Mitigation

- None

Conference Sessions

Wednesday, March 8, 2023							
8:00 - 8:45 am Opening Session							
	HCM			Finance		General/Leadership	
9:00 - 9:45 am Session A	Overview of Time and Labor Rich Fayad	Job Modernization Anthony Rodgers		Procure to Pay Jocelyn Milla		Project Roadmap & Strategy Beckie Benson, Andrew Esserman	
10:00 - 10:45 am Session B	Paysheets and Payline Janine Perez, Matthew Swartout	Fluid Position Mgmt Lisa Nguyen		Accounts Payable Tips in a New World Jonathan Meraz		Protect Your District by Conducting a PeopleSoft Security Audit John Vaillancourt, Sally Morton	
11:00 - 11:45 am Session C	Payroll Processing and Addressing and Preventing Payroll Errors Matthew Swartout, Janine Perez	Credentials in PeopleSoft Casey Choate, Monica Robinson		How we eliminated double entry for our HR team using PeopleSoft Data for Districts Kirby Fell, Peyri Herrera		Best Finance Queries by Module and How to Search for Them Ronald Pantaleon	Fluid and Portal Changes Overview Steven Clark, Anthony Rogers
12:00 - 12:45 pm Lunch							
1:00 - 1:45 pm Session D	Rapid Time Best Practices, Tips and Tricks Jason Cohee, Rich Fayad	How to Get Your New Staff Up to Speed Using New Training Roadmaps for HR Becky Fino		Accounts Payable: Automatic Clearing House (ACH) Rico Edillor, Sai Sundar		ServiceNow: Understanding How, What and Who of Ticket Processing Christopher Waite	
2:00 - 2:45 pm Session E	Paycheck Working Backwards Todd Conn, Anne Yuseco	New Retro Report Sharon Pacheco		Using Query Viewer for HCM Von Nguyen, Cristina Lopez		Purchasing Round Table Jocelyn Milla	What Does a PeopleSoft Upgrade Mean and What Goes Into It? Jim Collis
Thursday, March 9, 2023							
	HCM			Finance		General/Leadership	
9:00 - 9:45 am Session F	Adopting the Recruiting Solution Andrew Esserman	Retirement in PeopleSoft Beth Valderrama	Overview of Absence Management Rich Fayad	Inventory and the Accounting of Items Jocelyn Milla		3, 2, 1, Blast Off! How to Successfully Plan and Launch Your Next PeopleSoft Project Peyri Herrera, Reesa Fickett, Andrew Baldwin, Candace Wong	
10:00 - 10:45 am Session G	HCM Correct History and What You Need to Know Sally Morton	Benefits: Behind the Scenes Matthew Swartout	How to Maintain information for Non-Employees in PeopleSoft Steven Clark	Exploring Finance Queries Using Excel for Reporting Purposes Dora Reyes, Olivia Aguirre		PBCS: Narrative Reporting/Budget Books Wendyl Aban	New Time Leave & Substitution Project Beckie Benson, Andrew Esserman
11:00 - 11:45 am Session H	Best Queries to Run For a Successful Payroll Bruce Robert	Department (DBT) Mass Update Process Sharon Pacheco		Finance Queries: Where Does the Data Come From? Darrin Ortiz		General Ledger and Accounts Receivable Clean Up for Year End Ronald Pantaleon	Understanding PeopleSoft Next Generation (Supplier Portal, eProcurement, Fluid framework, vendor management) Sai Sundar
12:00 - 12:45 pm Closing Session							