

# PBCS Wave 3 Enhancements

## MONTHLY STATUS REPORT

Reporting Period

Prepared By

Current Status

May 23-June 23, 2023

Wendyl Aban

**On Track**

### Project Schedule

Planning Phase	Development	Testing	Project Closure
Completed	Completed	In Progress	July 1, 2023
Oct 27, 2022	Mar 10, 2023	June 26, 2023	

### Accomplishments

- The following enhancement requests have been migrated into ALL environments, including production:
  - INC0082849 – H&W Budgeting for Part Time employees
  - INC0074565 - Exception Hourly Step Advance Calculation

### In Progress

Enhancement Request	Status
INC0059344 – Prorate H&W benefits for all EE who have more than one position	Innofin notified to run the update for the PSTN_Calc_Compensation artifact. Once updated, SDCOE will perform a retro-test to ensure the ER still works as designed.
INC0071256 - Department User Advanced need ability to enter Revenue.	6/15 - Mtg with Innofin to discuss and review security group. Users could not see the revenue entry card. Kimberly/Christopher to undo the security group they created. Kate to re-migrate to epm7 and retest to ensure department users can access what they need. Kate to retest as a Department Adv. User. Kimberly to ask Alejandro to explain what is needed from a resource standpoint.

### Next Steps

- Finalize and complete last four enhancement requests
- Project Closure documents

# Recruiting Adoption and District Deployment Phase

## MONTHLY STATUS REPORT

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Current Status

May 23- June 23, 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
<b>Complete</b> July – Aug 6 weeks	<b>Complete</b> Oct - Jan 18 weeks	<b>In Progress</b> Jan-July 6 Months	July-Sep	Sep-Oct	Nov

### Accomplishments

- Developed and testing 5 enhancements based on gaps and pain points identified in the “As-Is” Business Process mapping

### In Progress

- Conducting future state "To-Be" sessions and change management sessions with all 9 Districts
- Creating change analysis documentation to support each district
- Configuring 2 new districts: Escondido and La Mesa Spring Valley

### Next Steps

- Conduct training and deployment with each district

### 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.

# AP\_ACH Project – Phase 2

## MONTHLY STATUS REPORT

Reporting Period

Prepared By

Current Status

May 23-June 23, 2023

Rico Edillor/ Sai Sundar

**On Track**

### Project Schedule

Planning Phase	System Configuration	System Integration Testing	User Acceptance Testing	Project Go Live	Project Closure
In Progress	TBD	TBD	TBD	TBD	TBD

### Accomplishments:

- Completed testing of supplier bank routing number validation.
- Migrated and deployed the custom process supplier bank routing number validation to production environment.
- Held working session with the core team to discuss changes to the current Supplier Portal business process

### In Progress:

- Working on defining the enhancement needed for the current Supplier Portal functionality.
- Identify new business process and needed customization to the Supplier Portal to accommodate the electronic collection of supplier's TIN number and W9 form.
- Document changes to the current Supplier Portal process for incorporation to existing user guide and job aid.

### Next Steps:

- Present the new business process flow and enhancement document to project sponsor for approval.
- Upon approval, developer to work on custom processes to accommodate the collection of supplier TIN and W9 form online.
- Perform unit test of the enhanced supplier portal
- Demo Supplier portal with custom process to project sponsor.

### Risks/Mitigation:

- New process flow will require customization that will take time to develop and test, which will further push back the project timeline. Provide timeline required to develop the custom process and dedicate full time developer to work on the project.
- Supplier will now be responsible for providing TIN/W9 information via the Supplier portal instead of district staff entering it for them. The supplier may not be completely agreeable to the upcoming changes. Emphasize that in order to get paid electronically, suppliers must do their part in providing their banking information themselves for security reasons to avoid compromise of their financial and PII information.

# Feedback Tools:

## Idea and Community Boards Software and Implementation

### MONTHLY STATUS REPORT

Reporting Period

Prepared By

Current Status

May 23- June 24, 2023

Uyen Quach

**Potential  
Risk**

#### 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. Completed documented use cases for PeopleSoft portal
2. Completed documented use cases for ServiceNow portal
3. Worked with IdeaNote to configure the POC environment
4. Implemented ServiceNow user role's use cases in IdeaNote POC environment.

#### In Progress

1. IdeaNote
  - a. Implementing ServiceNow admin's use cases
  - b. Implementing PeopleSoft use cases
2. InVision
  - a. Waiting for the vendor to setup POC environment

#### Next Steps

1. IdeaNote
  - a. Complete ServiceNow use cases
  - b. Complete PeopleSoft use cases

#### Risks/Mitigation

1. InVision has not provided an environment to utilize for POC. We have informed the product owner. The product owner contacted the vendor. Mitigation: Evaluate another vendor for POC and/or Select Idea Note based on POC.

# Payroll Encumbrance

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May 23-June 23, 2023

Jeff Collum

**On Track**

### Project Schedule

Planning Phase	System Configuration	System Integration Testing	User Acceptance Testing	Project Go Live	Project Closure
Complete 2-6-2017	Complete 2-28-2018	Complete 5-2-2023	Complete 4-14-2023	Complete 5-23-2023	7-31-2023

### Accomplishments

- Iteration 8 of System Testing completed successful
- User Acceptance Testing (UAT) completed successful
  - All districts were invited
  - 8 districts participated and gave a passing grade
- Project team recommended the new Encumbrance Adjustment program be migrated to Production
- Two Communications
  - General message to all users relating the change to the Payroll Distribution Statuses that are sent each month
  - Detailed message to those who received the monthly encumbrance adjustment email
- Begin using with the May payroll distribution
- Gained benefits
  - 4 days of manual processing eliminated
  - accounting for future dated events

### In Progress

- Monitoring SDCOE Service Portal for incidents related to payroll encumbrances.

### Next Steps

- Closure is scheduled for 7-31-2023. That will be following the 2<sup>nd</sup> production run of the process.

### Risks/Mitigation

# Tools Upgrade 8.58.13 & 8.59

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Steve and Jim

**On Track**

### *Project Schedule*

Planning/ Prep	System Configuration & Retrofit 8.59.16 TLS Project	System Configuration & Retrofit 8.58.13 Recruiting	Testing (QA & UAT)	Go-Live	Closure
Complete	In Progress	In Progress	July – September	TBD	TBD

### *Accomplishments*

- Applied Tools 8.58.13 to 'V' environments, including retrofits of modified objects. This will support our Kibana reporting framework.
- Applied Recruiting Solution PUM enhancement for Recruiting Kibana dashboards to 'V' environments.
- Applied Tools 8.59.16 to 'G' environments. This will support our Time, Leave & Substitution project.
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### *In Progress*

- Working on retrofit of modified objects for Tools 8.59.16 upgrade in 'G' environments.
- Cleaning up security, SYSAUDIT and DDDAUDIT reports as part of Tools upgrade.
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### *Next Steps*

- Migrate Tools 8.58.13 upgrade to 'I' environments to conduct system testing for Tools 8.58.13 upgrade and Kibana recruiting dashboards.
- Planning go-live date for Tools 8.58.13/Recruiting Adoption for Kibana dashboards – District Adoption and use case.
- Conduct system testing and training for Tools 8.59.16 upgrade. Migrate to 'T', 'PT' and eventually to 'P' (Prod) environment.

### *Risks/Mitigation*

- Find appropriate time on calendar to go-live with Tools 8.58.13/Recr dashboards

# TLS Planning

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Current Status

May 23– June 23, 2023

Jay and Andrew

**On Track**

- Project Schedule**

RFPs & 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	TBD	TBD	TBD	TBD	TBD	TBD	TBD

### Accomplishments

- High Level Scope defined.
- Project Charter draft complete
- Identified High Level Requirements
- Demos of Current TLS Systems – Conducted with 2 districts to date

### In Progress

- Working on Requirements and RFPs
  - RFP1 – Time Clock Devices
  - RFP2 – Kiosks/Tablets utilizing custom app/software.
  - RFP3 – TLS Project Implementation.
  - RFP4 – Project Management, Communication and Change Management.
  - RFP5 and/or Job Req – Resource SME for Substitution Management
- Discovery of Time, Leave and Substitution Processes – In Systems Today
- Project Charter
  - Initial draft complete
  - High level timeline being reviewed

### Next Steps

- Release RFPs to providers
- Draft MOU
- Detailed requirements from School Districts
- Build detailed project plan
- Finalize the Scope of Work.
- TLS Focus Group – 10 districts

### Risks/Mitigation

- Timeline risk due to ESSER funding date of Sept 24, 2024