# UCPath Project Status Report

<table>
<thead>
<tr>
<th>Report Date</th>
<th>March 16, 2012</th>
<th>Project Director</th>
<th>Anthony Lo</th>
<th><a href="mailto:Anthony.lo@ucop.edu">Anthony.lo@ucop.edu</a></th>
<th>Executive Sponsors</th>
<th>Nathan Brostrom</th>
<th>Peter Taylor</th>
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</table>
### Project Summary
After extensive review of the interface requirements and discussion with the UCPath Executive Steering Team and Wave 1 campuses, there is agreement to extend the project timeline. While the overall schedule will be extended by three months, the Wave 1 go-live will be extended by six months to provide an additional four months of development and an additional two months of testing. The additional time will also benefit business process standardization and shared services activities. The new go-live dates are:

- **Wave 1:** July 2013
- **Wave 2:** April 2014
- **Wave 3:** October 2014

The revised project plan is now under development, and Wave 1 campuses are developing resource requirements. The key activities over this review period have been the start of Business Process Mapping (BPM) and Conference Room Pilot (CRP) sessions with up to 65 SMEs from all locations attending each day. The project team continues analysis of functional gap recommendations and development of functional specifications, primarily for interfaces.

### Key Accomplishments
- After inventory and analysis of the integration effort and consultation with Wave 1 campuses, the UCOP and Oracle PMOs developed a new realistic, though still aggressive, implementation timeline.
- Completed site visits to three of four UCPath Center semifinalist locations (UCSB, UCD, UCR).

### Continuing/Upcoming Activities
- Assessment of Wave 1 location integration resource requirements.
- CRP and BPM sessions will continue through April 20.
- Site visit to remaining semifinalist UCPath Center location (UCOP); and final evaluation of UCPath Center locations.
- Incorporate the work of the Service Delivery Core Team into a blueprint for the UCPath Center workstream teams to begin more detailed planning and execution activities.
- A group has been formed to begin evaluating the potential approaches for GL/financial system integration; work has begun and will be fully underway in the next review period.
Key Decisions

✔ The new project timeline is finalized. The overall project timeline will be extended by three months, while the Wave 1 implementation will be extended by six months to July 2013.
✔ The Executive Steering Team agreed that UC will change from the current practice of 2088 hours to the more common 2080 annual work hours. To minimize the near-term impact on downstream systems, this change will coincide with Wave 3 implementation or soon thereafter (at a convenient/leveraged transition point).
✔ The Executive Steering Team agreed to maintain the current policy of a maximum of two years’ worth of vacation accrual. Those who are currently over the maximum amount will be “grandfathered” and allowed to reduce their accruals over a period of time to be specified. The CHROs will draft the implementation details of this standard by April 20, including a specific date for when employees with vacation accruals over the maximum will no longer accrue additional vacation leave and a specific date for when employees must use any accrued vacation leave over the maximum. Once the transition is complete, there will be no exceptions to the policy of a maximum of two years’ worth of vacation accruals.
✔ The Executive Steering Team agreed that there should be greater coordination and support for campus pay cycle conversions, including development and changes to PPS and conversion timing. This coordination will maximize synergies of similar efforts at multiple locations.

Upcoming Key Decisions

✔ Location of the systemwide Shared Services Center.
  Status: Six location proposals have been received. Four locations were selected for site visits. A final decision will be made by the Executive Sponsors in March.
✔ Structure and governance for ongoing systemwide Shared Service Center.
  Status: Service Delivery Core Team recommendations have been reviewed by the Executive Sponsors/Executive Steering Team. The Executive Sponsors will make a decision regarding UCPath Center governance in March, along with the location decision.
✔ Intersection between UCPath and AYSO and the appropriate solution usage and timing.
  Status: The intersection of functionality along with leverage opportunities and gaps in self-service capabilities are being compiled and analyzed, with a comprehensive approach agreed to in early April.
✔ Strategy/solution for “GL Tool” and integration with campus financial systems
  Status: A group has been formed to develop a better understanding of the options for potential solution(s), including standalone systems/tools outside of PeopleSoft, customizations or “bolt-ons” to PeopleSoft, interfaces as well as business process changes.
✔ Agreement on a standard medical center PTO program.
  Status: The medical center CHROs are discussing the existing programs.
✔ Identify Wave 2 and Wave 3 locations.
  Status: The Executive Steering Team agreed to decide on the campuses for Wave 2 and Wave 3 during its May meeting.
✔ Catastrophic leave sharing.
  Status: This standardization issue will be referred to the Practices Board for further discussion and a recommendation.
✔ HR transition planning for impacted staff.
  Status: VP-HR Dwaine Duckett has compiled CHROs’ and Controllers’ feedback to the draft plan for Executive Sponsors review.
### Issues

- The CRP and BPM sessions in March and April will address many process design and workflow issues, but subsequent iterations will be required to fully understand future state processes. The requirements for “payroll/GL integration” and related funds management, assessments, etc., and best approaches for addressing these needs are being analyzed and will require some amount of effort to fully understand.

- The UCOP PMO is evaluating options for pay cycle conversion prior to UCPath go-live. Not converting before UCPath go live will create risks to the payroll parallel test; the degree of risk needs to be analyzed and better understood. There are also change management implications of conducting both pay cycle conversion and go live simultaneously.

- It is not yet clear how to address ePerformance and TAM at several locations. There are outstanding questions about data conversion, interfaces and timing for conversion to single instances of these modules.

- Project team is drafting design guidelines that incorporate UC Security Policies related to Personally Identifiable Information (PII), Restricted Information, and Personal Health Information. Legacy interfaces currently include some protected information (e.g., SSN) and will be remediated as part of the project.

- It may be possible to reduce the number of interfaces needed by reducing the number of temporary interfaces and, instead, developing only permanent interfaces; the project team is now verifying the assumptions on which the interface designs were based.
System Implementation

- **Functional Design** – The CRP/BPM sessions began March 5 and will continue through April 20. To date, the sessions have been productive, and all scheduled topics have been addressed. Oracle and UC resources continue to analyze gaps and work through parking lot items. There are 62 known gaps. Analysis is completed for 18 gaps and underway on an additional 11 gaps. 13 gap recommendations have been reviewed by the central PMO. 33 interface functional designs have been started; of those, 10 have been approved. Initial meeting held to discuss the possible approaches for the intersection between UCPath and AYSO.

- **Technical Development** – The ODS development timeline is now being prepared; Oracle is securing consulting resources to support this effort. Four interface technical designs have been approved.

- **Data Conversion** – Mapping is complete for seven of eight Benefits data components. The team has begun review of systemwide job data extract.

<table>
<thead>
<tr>
<th>UCPath Center: Requirements</th>
<th>Start Date</th>
<th>Finish Date</th>
<th>Status</th>
<th>Decisions, Issues and Risks</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Technology Requirements Definition</td>
<td>2-15-12</td>
<td>4-30-12</td>
<td></td>
<td></td>
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<tr>
<td>5. Interactions Model</td>
<td>2-27-12</td>
<td>6-13-12</td>
<td></td>
<td></td>
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<tr>
<td>6. Facilities and Infrastructure Planning</td>
<td>4-2-12</td>
<td>6-30-12</td>
<td></td>
<td></td>
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<tr>
<td>7. Change Management Planning and Communication</td>
<td>4-16-12</td>
<td>8-31-12</td>
<td></td>
<td></td>
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<tr>
<td>8. Training Curriculum</td>
<td>5-14-12</td>
<td>9-15-12</td>
<td></td>
<td></td>
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<tr>
<td>9. Transition Planning</td>
<td>6-4-12</td>
<td>10-31-12</td>
<td></td>
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<tr>
<td>10. Implementation Build Phase (including staffing, training and post go-live change management)</td>
<td>7-1-12</td>
<td>9-30-13</td>
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**UCPath Center**

- **Blueprint Development** – With all design workshops concluded, completion of the blueprint is scheduled for late March. In the meantime, the UCPath Center scope of services document will be distributed to project stakeholders next week.

- **End-to-End Business Processes** – One key output of the BPM/CRP effort concerns the development of business processes that include workflows within and between campuses, medical centers and the UCPath Center. This will be an iterative effort. In parallel with the sessions, the project teams are analyzing possible approaches to the most significant of the functional gaps that are raised, including Manager Self Service and transmission of hire data to the UCPath Center.

- **Technology Workstream** - A request for SMEs to develop business requirements for the case management system that will be used at the UCPath Center was sent out this week to campus project managers. The initial sessions are targeted for early April.
**Change Management/Communication**

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<thead>
<tr>
<th></th>
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<th>Finish Date</th>
<th>Status</th>
<th>Decisions, Issues and Risks</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Assessment</td>
<td>10-1-11</td>
<td>12-16-11</td>
<td></td>
<td><strong>Issues</strong></td>
</tr>
<tr>
<td>2. Communication</td>
<td>10-1-11</td>
<td>ongoing</td>
<td></td>
<td>✓ Training Lead has left the PMO and recruitment is underway for replacement.</td>
</tr>
<tr>
<td>3. Change Management</td>
<td>10-1-11</td>
<td>ongoing</td>
<td></td>
<td>✓ Various communications needs exist for the project. Some can be addressed via appropriate vehicles now/soon; others must await subsequent activities, such as BPM and CRP sessions.</td>
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<tr>
<td>4. Training Assessment</td>
<td>1-15-12</td>
<td>4-15-12</td>
<td></td>
<td></td>
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<tr>
<td>5. Training</td>
<td>9-1-12</td>
<td>7-30-13</td>
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**Change Management/Communication**

✓ **Communication Plan** – Reviewed updated communication plan with campus Communication Leads. Planning is underway regarding communication vehicles for UCPath Center location announcement expected in March/April.

✓ **Campus Site Visits** – Site visits are underway at Wave 1 locations to agree on central and local roles and responsibilities and next steps to support UCPath communication milestones. The central PMO is also providing support to Wave 1 locations in the development of local communication plans.

✓ **Training Assessment** – The revised training assessment was distributed to campuses. The assessment focuses on high level training capability and infrastructure.

**Project Management**

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<th>Status</th>
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<tbody>
<tr>
<td>1. Staffing</td>
<td>8-22-11</td>
<td>4-15-12</td>
<td></td>
<td><strong>Risks</strong></td>
</tr>
<tr>
<td>2. Project Planning and Tracking</td>
<td>9-6-11</td>
<td>ongoing</td>
<td></td>
<td>The project continues to fill open positions, but there are still a number of open project roles on both the functional and technical sides as implementation activities continue to ramp.</td>
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<tr>
<td>3. Campus Coordination</td>
<td>11-8-11</td>
<td>ongoing</td>
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**Project Management**

✓ **Staffing** – The project’s testing lead and data architect roles have been filled; new hires will start in late March-early April. The PMO is currently recruiting for positions in the technical, training and planning integration workstreams.

✓ **Revised Project Plan** – With the new timeline established, work continues to determine the related campus integration work effort. A new plan will be completed by the end of March.

✓ **Integrated Project Plan** – Once the revised UCPath system implementation plan is complete, work can again focus on development of an integrated project plan.