

City Colleges of Chicago

PeopleSoft HCM 9.0 Upgrade

A Transformation Through Technology Case Study

The City Colleges of Chicago (CCC) is the nation's second largest community college system, with 160,000 students across 15 locations. Comprised of seven community colleges, CCC provides valuable learning opportunities for Chicago's diverse population. www.ccc.edu

Project Objectives

- ▶ Challenge existing processes against the Version 9.0 software
- ▶ Gain efficiencies and streamline business process
- ▶ Reduce administrative overhead
- ▶ Eliminate shadow systems and procedures existing outside of the core IT environment
- ▶ Eliminate customizations where the new version delivers the same functions
- ▶ Enhance overall functionality
- ▶ Increase use of self-service functionality
- ▶ Empower employees with decentralized access
- ▶ Automate (and simplify) recruitment, time collection, performance management, vendor relations, etc.

The Institution

City Colleges of Chicago (CCC) is a highly complex institution with seven individually accredited colleges and eight satellite locations throughout the city. All enterprise technology implementations and upgrades must meet the needs of these dynamic and geographically dispersed college campuses.

Early Adopter – Oracle/PeopleSoft Human Capital Management (HCM) Version 9.0

CCC implemented Oracle/PeopleSoft's HR Release 7.6 in 2000 and upgraded to HCM Version 8.3 in 2003. In 2007, CCC and its implementation partner, Synch-Solutions, jointly upgraded the HCM system to Version 9.0. CCC was among the earliest institutions to implement this version. Along with the functional upgrade from Version 8.3 to 9.0, the project included a PeopleTools upgrade from Version 8.19 to 8.48.

Under Budget and Ahead of Schedule

The project commenced in September 2007 and ran through July 2008, coming in under budget and ahead of schedule. A very structured "plan, design and test" approach was used to achieve these results. The upgrade team was comprised of dedicated project resources from Synch-Solutions supported by subject matter experts from CCC's HR/Payroll department and Production

Support Team, and HR liaisons from the colleges. This resource configuration circumvented the need for a very large project team. After the internal CCC staff attended HCM 9.0 demos, Synch-Solutions led Scope and Planning Sessions in which its dedicated team, along with CCC IT professionals and subject matter experts, developed a scope for the whole project life cycle. Scheduling and resources were confirmed in these sessions. The ensuing upgrade was milestone-based, with the project manager working closely with the CCC PMO to ensure that each milestone was met and accepted by the CCC Project Team Leads, Program Manager and Project Executives before moving forward.

Opportunity Seized to Dovetail Upgrade with Strategic Planning

In the Scope and Planning Sessions, CCC and the Synch-Solutions team prepared a list of all currently delivered functions, as well as functions that would be delivered with the upgrade, and analyzed whether or not each one supported the institution's 2011 Strategic Plan. The comprehensive list of current and future functionality enabled the institution to solidify its roadmap for the future. Each item on the list was challenged with the following questions: Is it being used? Does it work? Will it ever be used? If yes, when? Should we remove it?

When the project commenced, this planning work enabled the project team to eliminate unnecessary functions and build a foundation for functions that – though not needed now – would be rolled out at a later date. This approach created efficiencies in the initial upgrade process and ensured that the institution would not have to retrace steps prior to the execution of each phase.

The Deliverables: Enhancements and New Functionality

The upgrade provided enhancements to functionality already being utilized for Human Resources, Payroll, Benefits Administration, and Time and Labor Management. It also provided all-new functionality, including Labor Administration, Benefits Billing, Automated Requisitions and the Person Model.

Transition Challenges Minimized for Users

A key aspect of the project was that it included a two-step upgrade – from Version 8.3 to 8.9, and then on to 9.0 – that was experienced by the end user community as a seamless, one-step transition. Through careful planning that began several months before the project was kicked off, CCC and the Synch-Solutions team were able to minimize the challenges for users. From the technical perspective, the project consisted of a two-version upgrade, but from the end user perspective, it consisted of a single upgrade, with a single set of tasks and sign-offs. Sign-offs for the first upgrade

were handled exclusively at the district level. The Project Team ensured a smooth transition to production support by integrating CCC's IT Production Support Team and its Help Desk employees in all end user training and knowledge transfer sessions. For post-production support, a separate Project Help Desk was established for the "go-live" event and initial few weeks in the production environment. After several weeks of successful operation, responsibilities were gradually transitioned back to CCC's Production Support Team.

Beyond seamless management of the two-version upgrade and the Project Help Desk described above, another aspect of the project that minimized risk for the institution was that three additional test moves were undertaken beyond the recommended three. The six trial moves allowed for continuous updating of scripts and preparation of data for the production environment. This approach readied the system for a final cutover with minimal risk and user involvement.

Communication and Training

Weekly project status meetings were held for both technical and functional teams. Supplementing these face-to-face communications was a newsletter called "The Buzz." The newsletter highlighted critical schedules, training, events, and issues in need of attention, and was distributed to the entire community. A project email group was also established to ensure effective team communication on a daily basis during periods of critical

project cutover. The Oracle/PeopleSoft User Productivity Kit (UPK) was employed for testing and training during the project, and each process was recorded for future playback. Since project completion, users have been able to pull up relevant content about any aspect of the system at any time by accessing the UPK manuals online. All they have to do is click on "show me," "help me," "try it" or "do it" and they can interactively refresh or retrain on an HCM 9.0 process.

Measurements of Success

Objectives of the project were fully met. Prior to the project, CCC maintained several shadow systems to supplement information within PeopleSoft. These systems created inefficiencies and introduced room for error through manual reentry of data into the PeopleSoft system. CCC has gained measurable efficiencies with the new system, most significantly in the area of payroll processing time. In addition, paychecks are now paperless and paycheck stubs can be viewed online via self-service.

CCC has also gained efficiencies through new functionality that enables time entry as a group rather than requiring a separate entry for each individual. And automated electronic routing of candidates' resumes and electronic approval has reduced time-to-hire. Further, the HCM application is now patch-current, with all tax updates applied. And, very importantly, the upgrade was accomplished with minimal transition challenges for users, and without significant customizations.

ORACLE PARTNER

ABOUT SYNCH-SOLUTIONS

Synch-Solutions is a leading management consulting and technology services firm committed to delivering business transformation solutions that elevate the value an organization brings to its entire community. We are headquartered in Chicago, Illinois.

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