UCPath Project
Quarterly Meeting

March 16, 2017
Agenda

1. Welcome & Opening Remarks (Steering Committee)
2. System-wide Project Update (Bill Bonner)
3. UCSB Project Status (Maria Ayllon & delivery managers)
4. Questions
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## Agenda

<table>
<thead>
<tr>
<th>Item</th>
<th>Topic</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>D1 Date updates</td>
<td>Updates to deployment date and interim milestones for D1</td>
</tr>
<tr>
<td>2</td>
<td>Conversion Overview</td>
<td>Information and updates on key conversion activities.</td>
</tr>
<tr>
<td>3</td>
<td>Functional Overview</td>
<td>Information and updates on key functional design, config and TAM/ePerf activities.</td>
</tr>
</tbody>
</table>
D1 Schedule Update
D1 Schedule Review

As the D1S has recommended approval of a Go Live date, the PMO will begin to align the current schedule with that date and begin validation of the activities and tasks that make up the location and workstream effort. Following is the timeline for completing the D1 schedule validation and update:

<table>
<thead>
<tr>
<th>Date</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/7</td>
<td>D1 SC Recommendation received</td>
</tr>
<tr>
<td>3/10</td>
<td>Gantt updated and reviewed with Bill</td>
</tr>
<tr>
<td>3/13 – 3/15</td>
<td>Send Gantt to Workstream Leads for review</td>
</tr>
<tr>
<td>3/15</td>
<td>UCPath Steering Committee review and recommendation</td>
</tr>
<tr>
<td>3/16</td>
<td>Review updated Gantt with D1 PMs</td>
</tr>
<tr>
<td>3/16 – 3/31</td>
<td>Update of D1 project plan (requests for updates from locations and work streams will be sent)</td>
</tr>
<tr>
<td>3/21</td>
<td>ELT approves D1 date</td>
</tr>
<tr>
<td>3/22</td>
<td>D1 Project High Level Gantt base lined</td>
</tr>
<tr>
<td>3/23</td>
<td>D1 Gantt and Schedule posted to SharePoint</td>
</tr>
<tr>
<td>3/24</td>
<td>Request for Updates to Plan from Locations and Workstream Leads</td>
</tr>
<tr>
<td>3/30</td>
<td>D1 Schedule Review will resume in the D1 PM/PMO Meeting</td>
</tr>
</tbody>
</table>
Pilot Conversion Update
**Status: Conversion**

- **IT2.1 conversion**
  - Smoke test completed March 2
  - Milestone conversion scheduled for completion March 16; HR ACA data to be omitted

- Converted data, metrics and validation reports targeted for March 20

- **PPT1 development**
  - 146 issues identified for PPT1; 121 still outstanding
  - 29 defects ready for testing

- February 27: Addressed open questions regarding Job data validation

- March 27-29: Conversion summit
D1 Conversion Approach Next Steps
D1 Conversion Approvals High-Level

- **Draft Design**
  - HR, Benefits and Payroll Designs sessions concluded as of 3/9
  - GL sessions scheduled from 3/13 – 3/30
  - TAM/ ePerformance tentatively scheduled in April

- **Location Signoff**
  - PMO releases D1 design documents, post design sessions, for Location review and signoff to indicate development may begin

- **Development / Cleanup**
  - PMO begins development on approved conversion documents
  - PMO works with locations as needed for clarifications
  - Locations begin local data profiling and cleanup activities

- **Data Validations**
  - PMO releases the converted data
  - Locations begin data validations
HR – Person, Job, & Position Data Timeline

**Design Complete**
- Person, Job, & Position Conversion Design Sessions complete
- All follow-up items remaining from the sessions are resolved
- Draft Person, Job, & Position CDDs & CMDs complete and signed off by the Locations

**Legacy Data Provided**
- Locations provide/coordinate PPS Snapshots, PeopleSoft Data, and any external files for the Person, Job, & Position conversion
- UCPath Conversion Team is building the Person, Job, and Position programs

**Programs Built**
- Initial Person, Job, & Position conversion programs development complete

**Data Provided**
- Conversion development, unit testing, and functional testing complete
- DDODS connection established and unit tested
- Location ODS environment established/ready for data
- Partial DDODS burst containing only Person, Job, & Position data sent to Locations
Functional Design Update
Configuration Data Collection Process

**Distribute Templates**
- Additional description details added for key data fields
- Links to relevant CSD document also provided for additional context

**Overview Sessions**
- Functional resources introduce key configuration fields
- Answer location questions about how the data is used across the module

**Complete Templates**
- Locations review and populate data based on config calendar
- Additional questions may be submitted and answers will be tracked on SharePoint

**Upload to Config Environment**
- Location data is uploaded to UCPath CFG environment
- Config pulls will occur to support D1 conversions

*Configuration Calendar Link*
# New D1 CEMLIs: Progress & Tasks

<table>
<thead>
<tr>
<th>CEMLI</th>
<th>Status</th>
<th>Next Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>I-300 AM Balances Outbound</td>
<td>Feedback / Updates Complete</td>
<td>Assign to functional resource.</td>
</tr>
<tr>
<td>I-175 Parking Employee Info</td>
<td>Feedback / Updates Complete</td>
<td>Assign to functional resource.</td>
</tr>
<tr>
<td>I-182 Parking Deductions Taken</td>
<td>Feedback / Updates Complete</td>
<td>Assign to functional resource.</td>
</tr>
<tr>
<td>E-063 Benefits Only SCTs</td>
<td>Feedback Complete / Updates In Progress</td>
<td>Jenn will update FDD with any critical location feedback.</td>
</tr>
<tr>
<td>I-368 Job Code Table Updates.</td>
<td>Development Complete</td>
<td>Deferred from Pilot; will be tested with D1.</td>
</tr>
<tr>
<td><em>I-353 Student Employment Eligibility</em></td>
<td>Retired</td>
<td>UCD no longer requires.</td>
</tr>
<tr>
<td><em>I-354 Usercode Hierarchy</em></td>
<td>Retired</td>
<td>UCD no longer requires.</td>
</tr>
</tbody>
</table>
## Functional Design: Next Steps

- **Finalize new CEMLIs:**
  - Assign to functional team resource
  - Finalize FDD and close out remaining location issues

- **Disposition remaining CRs:**
  - All CRs from CRP closed out, with exception of parking deduction codes (TBD after IT2 testing)
  - Several location-specific CRs pending feedback from locations

- **Future Issues / CRs:**
  - All questions need to be documented in JIRA
  - Requests for ad hoc meetings will be driven by documented issues that cannot be resolved in JIRA (to ensure the right resources are in attendance and that research can be completed in advance)
  - New CR Analysis Criteria / Template is under review and will be distributed soon
  - Requests for new CRs should be submitted on this template in order to collect the correct information
## TAM & ePerformance: Progress & Tasks

<table>
<thead>
<tr>
<th>Task</th>
<th>Expected Completion Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Develop Future State Process Designs</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Process maps and workbooks to document assumptions and process steps for future state functionality.</td>
<td>3/29/16</td>
<td>Complete</td>
</tr>
<tr>
<td><strong>Confirm System Requirements</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requirements Traceability Matrix sourced from PeopleSoft locations and reviewed by all UCPath TAM / ePerformance locations.</td>
<td>5/5/16</td>
<td>Complete</td>
</tr>
<tr>
<td><strong>Conduct Conference Room Pilot Sessions</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Created common understanding of functionality via system demos; validated requirements met as delivered and those requiring customization.</td>
<td>5/5/16</td>
<td>Complete</td>
</tr>
<tr>
<td><strong>Identify Required Customizations</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inventory of planned customizations with high-level detail of business needs.</td>
<td>5/19/16</td>
<td>Complete</td>
</tr>
<tr>
<td><strong>Develop Functional Design Strategy</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Approach to develop and review functional design documents with TAM / ePerformance locations.</td>
<td>5/27/16</td>
<td>Complete</td>
</tr>
<tr>
<td><strong>Approve Functional Scope</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gain approval from Deployment 1 Subcommittee for identified customizations</td>
<td>7/18/16</td>
<td>Complete</td>
</tr>
<tr>
<td><strong>Conduct Functional Design Phase</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Draft FDDs, review with locations, and update as necessary.</td>
<td>6/15/16 – 3/7/17</td>
<td>Complete</td>
</tr>
<tr>
<td><strong>Design Finalization and Resolution of Issues</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finalize FDDs and close out remaining issues / decision documents.</td>
<td>3/8/17 – 3/28/17</td>
<td>In Progress</td>
</tr>
</tbody>
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UCPath at UCSB – What does a new schedule mean?

1. Not an extension
2. Additional work to identify, mitigate risks
3. Reinforces need for pro-activeness
UCPath at UCSB – Key Milestones & Activities

Project Management
• Align campus activities to new D1 milestones
• Risk management

Future State Process Design
• All processes completed by June 2017

Org. Readiness, Training & Communications
• Future state campus-wide socialization
• Central Offices impact assessment
• Training strategy & plan

Systems Integrations
• Tier-1 QA completed by May 31
• Finalize tier-n inventory
• Testing strategy & plan

Data Conversion
• PPS mapping assessment
• Collect configuration data
UCPath Future State Process Designs Complete

[Chart showing Future State Process Design (FSPD) Sponsor Sign-Offs with cumulative actual and planned progress over time from November 2016 to July 2017.]
**Workstream Status - Future State Process Design Development**

<table>
<thead>
<tr>
<th>Status</th>
<th>AM</th>
<th>BN</th>
<th>CF</th>
<th>COMP</th>
<th>GL</th>
<th>PY</th>
<th>RF</th>
<th>SI</th>
<th>TA</th>
<th>WFA</th>
<th>T:</th>
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</thead>
<tbody>
<tr>
<td>NOT STARTED</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>0</td>
<td>27</td>
<td>6</td>
<td>1</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>42</td>
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<tr>
<td>ON HOLD</td>
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<td>0</td>
<td>0</td>
<td>0</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>IN PROGRESS</td>
<td>5</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>3</td>
<td>5</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td></td>
<td>18</td>
</tr>
<tr>
<td>DONE</td>
<td>0</td>
<td>33</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>34</td>
</tr>
<tr>
<td>DEVELOPED</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>2</td>
<td>12</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>18</td>
<td>34</td>
</tr>
<tr>
<td><strong>Total Unique Issues:</strong></td>
<td><strong>7</strong></td>
<td><strong>34</strong></td>
<td><strong>4</strong></td>
<td><strong>2</strong></td>
<td><strong>32</strong></td>
<td><strong>23</strong></td>
<td><strong>1</strong></td>
<td><strong>2</strong></td>
<td><strong>1</strong></td>
<td><strong>23</strong></td>
<td><strong>129</strong></td>
</tr>
</tbody>
</table>

Grouped by: Module(s)
UCPath Tier-1 Interfaces Complete

Tier 1 Interface Quality Assurance (QA) Sign-Offs

Cum. Actual  Cum. Plan
# UCPath Financial System Integrations

<table>
<thead>
<tr>
<th>ID #</th>
<th>Description</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>I-101</td>
<td>Chart of Accounts to UCPath</td>
<td>QA Phase 1 Complete</td>
</tr>
<tr>
<td>I-170</td>
<td>Accounts Combos to UCPath (conversion only)</td>
<td>QA Phase 1 Complete</td>
</tr>
<tr>
<td>I-370</td>
<td>FAU Validation Web Service called by UCPath</td>
<td>Technical Design</td>
</tr>
<tr>
<td>I-303</td>
<td>Employee Vendor Banking info update</td>
<td>Development nearly complete</td>
</tr>
<tr>
<td>E-718</td>
<td>Costing Journal from UCPath to KK</td>
<td>Functional Design awaiting approval</td>
</tr>
<tr>
<td>E-714A</td>
<td>Labor Ledger Payroll Expense Journal from UCPath to GL</td>
<td>Functional Design</td>
</tr>
<tr>
<td>I-703</td>
<td>Journal Writeback from GL to UCPath</td>
<td>Planned start 3/23</td>
</tr>
<tr>
<td>AP72</td>
<td>Personal and Email data updates from UCPath/Identity to PS/AP</td>
<td>Planned start 4/14</td>
</tr>
<tr>
<td>E-714B</td>
<td>Payroll Benefits Offset Journal (Budget journal)</td>
<td>Planned start 5/9</td>
</tr>
<tr>
<td>E-714W</td>
<td>Work Study Recharge Journal</td>
<td>Planned start 6/2</td>
</tr>
<tr>
<td>I-154</td>
<td>Staffing Extract (Data Warehouse)</td>
<td>Process Analysis starts 3/20</td>
</tr>
<tr>
<td>FS-I-100</td>
<td>Data Import Utility</td>
<td>Technical Analysis</td>
</tr>
</tbody>
</table>
Workstream Status – Identity & Access Management (IAM)

Key Milestones
• Finalizing FDD for Real-time IAM Interfaces (4 in total)
• Finalizing TDD for Real-time IAM Interfaces
• Developing Real-time IAM Interfaces
• IAM provisioning based on UCPATH Data
• Employee ID transition strategy
• IAM Application retrofit to accommodate UCPATH

Accomplishments
• Allocated 1.5 FTE to IAM UCPATH effort

Upcoming Activities
• Complete FDD/TDD for real time interfaces
• Recruit IAM UCPath Senior Identity Integration Developer
• Develop a SOA blueprint for UCSB/UCPATH
Workstream Status – Academic Affairs IT

Key Milestones
• Provide Functional Design Documentation
• Provide Technical Design Documentation

Accomplishments
• Completion of E-081 Functional Design Document and Submission - 2/15
• Completion of E-081 Technical Design Document and Submission - 3/15
• Initiated preliminary meetings with Academic Personnel regarding mass update plans and options.

Upcoming Activities
• Review of Converted Campus Data
• Updates (“Augmentation”) for UC Path Employee ID / Campus ID Deprecation
• Import Post Doc data into APFolio in preparation for UCPath mass updates.
Workstream Status – Transportation & Parking Services

Key Milestones
• **(May 2017)** UCPath Tier-1 Interface Design Specification provided to T2 Systems (vendor based parking management software)
• **(August 2017)** T2 Systems provides automated data imports and exports for I-175, I-176, I-178, I-182 (UCPath standardized Parking Payroll Deduction)

Accomplishments
• ARIT/TPS completed Payroll Deductions Process Documentation
  • Current State and Future State Design
• Meeting with UCLA, Riverside, Davis to review T2 interface integration plans on Feb. 10, 2017
• T2 Meeting with all UC Customers at T2 Re-Connect (3/21-3/22)

Upcoming Activities
• T2 Systems development of UCPath Tier-1 Interfaces per Design Specification
• T2 data import and export interface testing
Workstream Status – Student Affairs & Graduate Division

Key Milestones
• Tier 1 Interface – I-156 (FICA Exempt Flag)
• Tier 1 Interfaces – I 158/9 (Work-Study)
• Tier 1 Interface – I-160 (Grad Tuition Reimbursement)
• SA-01 (Identity Sync, including New EMPLID issue)
• SA-03 (Employee Data Sync)

Accomplishments
• I-156 FDD Completed
• I-158/9 FDDs Completed
• SA-01 FDD Framework Established
• SA-01 FDD Completed for New EMPLID throughout all SA systems
• SA-03 FDD Framework underway w/ mapping from B. Miller/M. Tornquist

Upcoming Activities
• Complete TDD for I-156 by 3/31/17
• Complete TDD for I-158/9 by 3/31/17
• Complete FDD for I-160 by 3/17/17
• Complete TDD for I-160 by 4/3/17
• SA-01 Complete TDD by 4/17/17
• SA-03 Complete TDD by 4/17/17
Workstream Status – UCPATH Data Conversion

Key Milestones
Participated in UCPATH Data Conversion Design sessions for:
• Workforce Administration (HR)
• Benefits
• Payroll
• Absence Management
• GL
Workstream Status – UCPATH Data Conversion

Accomplishments

Status
Total Issues: 641

- Done: 341
- To Do: 283
- In Review: 16
- In Progress: 1

53% Done
# Workstream Status – UCPATH Data Conversion

## Upcoming Activities

- Sign-off of data conversion rules from functional owners

<table>
<thead>
<tr>
<th>Module(s)</th>
<th>TO DO</th>
<th>IN PROGRESS</th>
<th>IN REVIEW</th>
<th>DONE</th>
<th>T:</th>
</tr>
</thead>
<tbody>
<tr>
<td>AM</td>
<td>29</td>
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<tr>
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<td>181</td>
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<tr>
<td><strong>Total Unique Issues:</strong></td>
<td><strong>283</strong></td>
<td><strong>1</strong></td>
<td><strong>16</strong></td>
<td><strong>341</strong></td>
<td><strong>641</strong></td>
</tr>
</tbody>
</table>

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31
Workstream Status – Data Warehouse

Key Milestones
• Learn the new data—currently working with masked UCOP data
• Develop the ETL (extract, transform, load) from the DDODS
• Build new & modify existing Hyperion reports
• Build new & modify existing EZ Access reports
• Training & documentation

Accomplishments
• Extensive analysis of new labor ledger tables with masked UCOP data
• Possible solution for retrofitting new data to historical payroll table (currently 160 fields—50 new, 62 deprecated, 27 unchanged)
• Modified EZ Access login to use UCSBCampusID instead of employee ID

Upcoming Activities
• Continued work on payroll/labor ledger retrofit
• Develop alternative labor ledger report in native format
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