



Project Charter

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1. Executive Summary

The CMS Project is an initiative that involves all 23 campuses and the implementation of PeopleSoft Human Resources, Financials and Student Administration software.

In 1997 the Chancellor's Office implemented the Common Management Systems (CMS) effort to consolidate the management systems of the CSU system and to identify one software package, which would effectively support its Human Resources, Financial and Student systems. Several software solutions were reviewed, which resulted in the selection of PeopleSoft for Human Resources, Financials and Student systems.

Central prototyping efforts have taken place in the Chancellor's Office to develop the CSU baseline software that was delivered on September 1, 2000. First wave campuses have access to the prototype database that includes table setup data, and customizations.

Additionally, a web site is used to maintain the documentation that will accompany the baseline such as functional and technical specifications, table configuration documents that specify system-wide setups vs. campus specific setups, among others. All documentation will be available to the campuses and service providers to assist with the implementation on campus.

2. Background

The Central Vision for the Project

As a result of a successful Common Management Systems (CMS) project implementation the CSU system will operate in an environment where:

- Students have access to information and technology to enable and enhance their educational experience within our systems.
- Faculty have the ability to pursue educational excellence, being enabled to serve their constituency, using the most efficient methods offered by the best technology and information dissemination can offer.
- Staff is able to efficiently operate and provide the highest quality service to the institution and it's constituents.

The CSU Mission or Target for the Project

The mission of the CSU's administrative functions is to provide efficient, effective, high quality service to students, faculty, and staff. This mission will be accomplished in part through the achievement of the "target administrative environment" by the year 2008. By 2008 the CSU (23 campuses plus the Chancellor's Office) will:

- Perform administrative functions in concert with a common set of administrative "best practices" approaches.
- Support administrative functions (initially including human resources, financials, and student services) with a shared, common suite of applications software.
- Operate the administrative software suite at shared service centers.

In order to measure progress and ultimate success of the project, outcomes and objectives have been developed for the CSU community to use in keeping track of CMS.

CMS Strategic Outcomes

At the outset of the CMS planning process in 1996, agreement was reached on the following outcomes both to guide the selection of software and to measure its success once implemented:

- High quality customer service
- Information quality
- Enhanced ability to manage change
- Personal satisfaction and productivity
- Cooperative environment
- Improved efficiencies

CMS Project Objectives

The following Business Objectives were the key drivers for the purchase of the PeopleSoft applications. Once the applications have been implemented and are operational, campuses will have accomplished these Business Objectives:

- Minimize cost to implement and maintain application software
- Minimize time to implement application software
- Adopt best practices or foundation for best practice, where possible during the implementation process
- Establish standards to share information for common reporting purposes
- Promote multi-campus cooperation and collaboration via incentives
- Leverage limited resources
- Provide ready access to current, accurate, and complete administrative information and the means to use it in an efficient manner

How Will CMS Benefits Be Realized?

For Individuals:

There are significant benefits that will accrue to individuals on campus when CMS is fully implemented. Some of these may already be available to some individuals on some campuses based on localized initiatives. Benefits that individuals across the system will realize include:

- Improved and student centric interfaces with the institution for critical activities. Examples include:
 - More timely information on admission requirements
 - On-line admission and on-line checking of admission status
 - Electronic grade reporting
 - Electronic access to financial aid information and status
 - Timely “grad checks”
 - Instantaneous information about course prerequisites, required reading, texts and other materials along with links to vendors that can accommodate electronic purchase
- Better tools and more timely information for faculty to use in advising students
- Access to their own human resource information at will (leave credits, year-to-date-deductions, etc.)

For the Better Operation of the University:

As a whole, the CSU is committed to the improvement of the effectiveness, efficiency and overall quality of its management to better serve the academic mission of the University. CMS is a key ingredient to that improvement process by providing:

- Human Resource, Financial and Student information that is integrated, accurate, accessible and timely will enable:
 - Management of business processes and decisions based on fact instead of intuition
 - Long-range strategic planning
 - The ability of the University to respond to external and economic problems and demands for increasing accountability by critical funding sources
 - The ability of the University to respond to Federal, State and internal audit requests
 - All levels of users to access data when they want and in a format that is meaningful to them without having to wait for programming resources to become available
 - Improved Human Resources processes, which help to recruit and retain qualified faculty and decrease the time from requisition to hire
- Standardized University-wide business processes, policies, and system access methods will:
 - Facilitate standardized training and consistent application of University policies.

- Allow employees to transfer between departments and campuses without requiring a large investment in training.
- Require less effort applying and maintaining campus-unique software enhancements.
- New technology, systems and business processes will require the development of a highly skilled, motivated workforce that will:
 - Facilitate improved staff retention and staff recruitment.
 - Allow the redirection of staff time and effort to academic pursuits.
 - Elimination of redundant data entry. Data will be entered once, electronically, as close as possible to its point of origin.
 - Better and more reliable, comparative data.
 - Greater fiscal and administrative accountability to legislators and regulators

3. CSUF CMS Project Vision

The CSUF CMS project encompasses more than just the implementation of the system wide developed PeopleSoft deliverables. It also envisions the continuing development and augmentation of the administrative systems, web, and data warehousing capabilities to support the educational mission of the university. CSUF intends to provide an environment and infrastructure where:

- All administrative functionality needed by a university faculty or staff member is available via a Web interface
- A student, faculty member, and/or staff member can service the majority of their own administrative needs via a simple, secure Web interface available at any time from any location
- Planning, decision support, reporting and other needed information is readily available via an easy to use reporting infrastructure which includes Web interfaces

The Executive Planning Committee has identified technology as a key to fulfilling the Teaching Mission of the university: "Technology can enrich and assist teaching and learning. The University has made a substantial commitment to technology access for faculty and students, providing the foundation for increased application of technology in the academic program"

To support this strategic direction, the CSUF administrative systems will provide timely transactions and information to better support students' journeys through an educational experience that prepares them with critical thinking and technology skills for their career after graduation and pursuit of lifelong learning.

4. CSUF CMS Project Goals and Objectives

- To provide an underlying technical infrastructure that will support robust Web enabled delivery of administrative services and information to all university constituents and that will readily adapt to new innovations in technology.
- To provide an integrated suite of administrative applications in which data is entered only once and is consistent and accurate across all applications.
- To provide easy to use and understand access to administrative services and information.
- To make possible the "anytime, anyplace, anywhere" availability of administrative services and information.
- To successfully implement the project in a manner that controls costs and utilizes campus resources in a responsible manner, values the efforts of individual employees, and allows for participation by all affected constituencies.

5. CSUF Project Scope

Phase I is defined as the implementation of the CMS baseline modules delivered by SOSS:

Functionality	Expected Go-Live Date
HRMS – Administer Workforce, Base Benefits, and Time & Labor functionality	December 1, 2005
Finance – General Ledger, Purchasing, AP, AR/Billing, Asset Management Modules	July 1, 2007
Student – Recruiting, Admissions, Student Records, Financial Aid, Student Financials, Academic Advising, Campus Community	April 14, 2008

In the event that additional functionality or modules are added to the CMS baseline software during our implementation, CSUF will reevaluate the project scope accordingly. If project timelines and resources permit, the scope may be broadened to include some or all of the baseline addition

6. CSUF Strategy

The project is on-track for receipt of the CSU CMS baseline software in October 2004. The projected go-live dates for CSUF are December, 2005 for Human Resources version 8, and July 2007 for Financials version 8.4. Student Administration version 8.9 is scheduled for April 2008. Efforts will be continued to build the project infrastructure and introduce various campus constituencies and stakeholders to the project as it moves forward.

As a “second wave” campus, Cal State Fullerton is in an advantageous position to learn from the experience of those who have preceded us in PeopleSoft implementations. We have access to knowledge gained by our colleagues and with that, opportunities to reduce certain costs and implementation time requirements.

Like the majority of our sister campuses, Cal State Fullerton does not have a Human Resources system; the PeopleSoft module will provide a full range of business processes and functionality related to the management of personnel data, recruitment, attendance and leave reporting, and benefits administration as well as self-service features. The state of California plans to implement a new payroll system. All CSU campuses must be ready for this and using CMS is the only way we can link to the new payroll system (Payroll is part of the PeopleSoft HR system.). Our legacy financial (FRS) and student information (SIS+) systems face uncertain futures and will eventually no longer be supported.

Critical Milestones

- Participate in the CMS Project as a second wave campus
- Conduct key CMS work in advance of engaging in implementation activities
 - Develop/implement funding plan
 - Develop/implement communications plan
 - Activate finance, human resources, student administration functional teams, and technical team
 - Develop/implement staffing plan
 - Conduct campus readiness assessment
 - Develop/implement process mapping strategy
 - Conduct current system process mapping
 - Develop/implement training plan
- Continue campus bridge-strategy solutions to provide needed functionality that cannot wait for the CMS implementation
 - Web-enabled data/information access and reporting
 - Continued maintenance with limited enhancement for the SIS+ Student Information system.

- Engage in CMS implementation with broad scale activities
 - Conduct fit -gap analysis
 - Conduct data conversion
 - Develop interfaces to legacy systems
 - Perform testing
 - Develop/implement user training plan
 - Go live
- Engage in CMS implementation with broad scale activities

Implementation Steps – HR

Phase	Start Date
• Planning	6/1/04
• Readiness Assessment	10/1/04
• Fit / Gap Analysis	11/11/04
• Design / Development	11/1/04
• Testing	4/22/05
• End User Training	6/01/05
• Deployment	8/01/05
• Go Live	8/18/05

Implementation Steps – Finance

Phase	Start Date
• Planning	7/04/05
• Readiness Assessment	10/01/04
• Fit / Gap Analysis	10/4/05
• Design / Development	04/03/06
• Testing	1/02/07
• End User Training	3/30/07
• Deployment	06/01/07
• Go Live	07/02/07

Implementation Steps – Student

Phase	Start Date
• Planning	09/01/05
• Readiness Assessment	02/01/06
• Fit / Gap Analysis	04/10/06
• Design / Development	10/02/06
• Testing	7/01/07
• End User Training	8/01/07
• Deployment	09/01/07
• Go Live	04/18/08