# PeopleSoft (9.0) Upgrade – Steering Committee Meeting Minutes

**General Services Conference Room**

**April 18, 2013 (4:00pm – 5:00pm)**

**Chair:** Calvin Madlock  
**Present:** Norma Ambriz-Galaviz (CCC Confer), Dominique Benavides, Teresa Chan, Michael Dioquino, Adela Esquivel-Swinson, Jeff Heyman, Ranell Holmes, Sadiq Ikharo, Patricia Lyon, Calvin Madlock, Mike Orkin (CCC Confer), Fred O'yang, Sheryl Queen (CCC Confer), Susan Rinne, Charlotte Smith (CCC Confer)

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<tr>
<th>Agenda Item and Presenter(s)</th>
<th>Discussion</th>
<th>Follow-up Action</th>
<th>Decisions</th>
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<td>Meeting Called to Order:</td>
<td>4:00 pm</td>
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| **I. Review and Approval of Minutes**  
  AVC Madlock | Minutes were reviewed and approved. |                 |           |
| **II. Project Status**  
  AVC Madlock | This week is for IT to fix errors that were reported and for functional users to conduct more testing. All testing will be done by Monday (4/22) next week.  
Fred O'yang reported that Payroll has completed 89% of their testing. The only thing holding them back are the tickets they submitted through FootPrints (about 5 tickets). Once these tickets have been fixed, Payroll will re-test again. Ranell was tasked to determine the status and progress of these issues.  
Ranell Holmes reported that Benefits has done some testing and Jennifer Seibert will be re-testing after IT fixes all errors reported. Both Benefits and HR are 90% completed.  
Ranell reminded everyone that there is only one analyst working on all the fixes for HR, Payroll, and Student Financials.  
The instructions for testing include logging in through the PROMT portal. This way the portal is also being tested. AVC Madlock said this is important to make sure all links and all access are setup correctly.  
All items under Finance (Line# 9 of the Deployment Plan) have not been touched, but the portal still needs to be tested. Finance staff should log in to the test portal in order to make sure they have access to all their modules. Susan Rinne reported | | | |
that they got the link today and she will be meeting with her staff to give them instructions for testing.

The Student Administration (SA) testing was a little bit more than what IT expected. We finally got documents from Oracle regarding the changes from 8.9 to 9.0. Sheryl Queen asked if the documentation included the additional setup tables. Patricia Lyon reported that Oracle is still looking for that information. Since we are one of the last institutions to upgrade, Oracle is having some difficulty finding all the documentation we've requested.

Sheryl Queen did some work over the weekend and made a lot of progress, but she doesn’t have the exact percentage of how much has been completed in the SA testing.

AVC Madlock thanked everyone that has taken time to test with the programmers in IT. He would like to see if all testing could be completed by Monday. He also asked that everyone reports back any results, so he can include in this report to the committee.

Dominique Benavides reported that she conducted testing with college bursars and Financial Aid officers. This week she has been doing most of the testing herself and working with Jesus Chanlatte regarding the credit card process. She has completed 45% of the Student Finances testing and was projecting to be 100% completed by May 30. She was unaware of the April 26 deadline and will try to finish all testing by the deadline.

### III. Review of Deployment Plan

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<td>COMMUNICATION PLAN (Line 28):</td>
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<td>AVC Madlock thanked everyone that collaborated to create the language for the communication plan. The first email to students and staff was sent on Monday 4/15.</td>
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<td>AVC Esquivel-Swinson suggest adding a header to the information that is on the Peralta website in order to make it more visible for students. Jeff Heyman will work with Patricia Lyon to make it more visible. The changes will be sent to VC Orkin to update the home page.</td>
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| Sheryl Queen mentioned that Merritt does not have any information regarding the upgrade on their website. Patricia Lyon will follow up with Merritt College (all colleges were sent the information for their website on 4/10).

Jeff Heyman asked for confirmation that mass emails, social media blasts, and Announcements will be sent once a week from now until deployment weekend – daily reminders will be sent the week of the Scheduled Outage. He suggests another email should be sent from the Help Desk.

**PROCESS GRADE ROSTERS (Line 36):**
Sheryl Queen will prepare some screen shots for faculty training.

AVC Madlock added a Processing Paper Rosters task (Line 38). Charlotte Smith explained that this might be needed for Attendance Verification Rosters, not Grade Rosters (AVC Madlock will move this task to the correct location). AVC Esquivel-Swanson will be sending out notifications to faculty (waiting on language approval from VC Orkin). The window for submitting Attendance Verification Rosters is from April 26 to May 6.

**NOTIFICATION OF COUNSELORS (Line 48):**
AVC Madlock sent out a personal notification to all counselors, but early on it was decided that college Presidents would also be responsible for notifying faculty and counselors.

Counselors requested information about how the dates for the implementation were selected. AVC Madlock addressed that with them. They also asked for training. Training for faculty will take place during Flex Day, but most counselors cannot attend at this time. A separate training session will be setup for them.

**STUDENT CENTER BANNERS (Line 49):**
College presidents were supposed to let IT know how many banners they'll need for their colleges. Patricia Lyon, Jeff Heyman and other members from the Steering Committee developed language to fit the posters. These posters will be placed at specific high traffic locations throughout the colleges (at the discretion of each college president). Eight posters for each college have been produced, in
addition to 4 posters for the District. GS or IT will distribute them to the college presidents.

STUDENT COMMUNICATION (Line 50):
Students are working with Jeff Heyman. Also, students have been participating in testing at the District IT Office. Mark Wilson has tested a couple of times. Nate Heller and another student are coming in tomorrow to conduct testing of the student portal.

PAPER REMINDER IN STAFF MAILBOXES (Line 54)
AVC Madlock has developed language that can go out in the format of a memo. It is up to the college presidents if they want to use this language or if they want to develop their own language for the handouts.

This could also be used at the district office.

FACULTY IN-CLASS ANNOUNCEMENTS (Line 56)
Faculty could assist by notifying students via in-class announcements. It was established at an earlier meeting that college presidents will assist with coordinating this task.

President Ambriz-Galaviz joined the meeting via CCC Confer. She will check with Alexis Alexander regarding notification of the project on the Merritt homepage.

FACILITIES TASKS (Line 57):
VC Ikharo will make sure that the power generators are tested. Michael Dioquino will work with GS to make sure everything is in place.

Also, GS will check with PG&E to make sure there aren't any scheduled power outages that could affect the project.

VC Ikharo has informed Police Services that IT staff will be here during the implementation weekend and after hours and will remind them again the week of the upgrade deployment.
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| INFORMATION TECHNOLOGY (IT) TECHNICAL TASKS (Line 61):  
The Interface Testing (Line 63) relates to all third-party applications (SARS, Moodle, Credit Card Payments, Higher One, etc.). All these applications need to be tested.  
The Re-Direct Sign-on Access (Line 65) has been created and its ready for Go-live. This is needed because we have to redirect the applications to the new servers.  
DEPLOYMENT ACTIVITIES (Line 68):  
These activities are for the technical staff in IT and they break down in more detail than what AVC Madlock is sharing with the Steering Committee.  
Teresa Chan completed the first dry run successfully. The next dry run will take place next weekend (April 27-28) and this will give us a better idea of the actual time needed to complete the upgrade.  
Within the next two weeks AVC Madlock will develop a Contingency Plan. This is the back-up plan we will have in place in case something goes wrong and it will allow us to go back to the old system.  
AVC Madlock shared the Speak PeopleSoft handout. It contains definitions of PeopleSoft concepts that we all need to be familiar with. This handout will be on the website. |

| IV. Open Forum  
All |

| Adjournment:  
5:05 pm |

| Next meeting:  
April 25, 2013, 4:00 pm – 5:00pm  
General Services Conference Room |

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