The California State Polytechnic University, Pomona and Sierra-Cedar Successfully Implement and Upgrade PeopleSoft Financials and HCM Software

CAL POLY POMONA

BACKGROUND

The California State Polytechnic University, Pomona (Cal Poly Pomona) opened in the fall of 1938 as the Voorhis Unit of the California Polytechnic School. In 1949, W.K. Kellogg deeded land to the State of California for a new campus. In 1966, Cal Poly Pomona separated from the San Luis Obispo campus to become California's 16th state college; University status was granted in 1972. Today, Cal Poly Pomona enrolls of total of 19,000 students in its undergraduate and graduate programs.

CHALLENGES

Cal Poly Pomona, and many of the other California State University (CSU) campuses, faced a number of information technology issues that were first acknowledged at the California State University System level in 1996 when a major planning effort entitled Common Management Systems (CMS) was initiated. Examples of the rationale for embarking upon a system-wide major initiative are as follows: (1) increased demand for services, by both academic and administrative users and students; (2) outdated legacy systems; (3) the demand for timely and accurate management information for decision making/ support; (4) greater costs of a prolonged, campus-by-campus approach which could spread over the next 10–15 years; and (5) need to continue essential services into the future on a state-of-the-art technology platform (Source: *"Why CMS,"* October, 1999).

Industry	Higher Education
Services	**Implementation and Upgrade** • Account Management • Functional Consulting • Technical Consulting
Application & Modules	• **PeopleSoft Financials 7.5** • **Human Resouces Management 7.6**
Client Since	2001

SOLUTION

The Common Management Systems (CMS) project began the ambitious undertaking of replacing the Financial, Human Resources, and Student Administration systems in a systemic fashion with common software. CMS designed an operations and maintenance support model using a single external maintenance support organization. Cal Poly Pomona elected to be a participant in the design of and among the first wave of campuses to implement the PeopleSoft Financials 7.5 and Human Resources Management System 7.6.

Cal Poly selected Sierra-Cedar to provide functional and technical consultation and assistance with project management and reporting. Working closely with the Cal Poly team, Sierra-Cedar implemented the Human Resources, Base Benefits and Payroll modules of the Human Resource Management System and General Ledger, Accounts Payable and Purchasing modules of the Financials System. When the new release of Human Resources Management became available, Sierra-Cedar also assisted in the upgrade to 7.6.

Sierra-Cedar provided management consulting services to assess the Information Technology organization to assist with leveraging staffing resources and to align their resources with the PeopleSoft and other high priority projects.

The Sierra-Cedar consultant was a pleasant, thoughtful professional who quickly gained the trust and respect of a variety of campus constituencies ranging from senior administrators to highly technical experts to passionate functional staff. His assistance proved invaluable for revealing critical decision points while lowering the emotional threshold.

Pamela McQuesten
Former Associate Vice President, I&IT

RESULTS AND BENEFITS

Within a nine-month period, Sierra-Cedar consultants and the Cal Poly Pomona staff went live with Financials and Human Resources Management systems on time and within budget. Cal Poly has experienced these benefits from implementing the new systems:

- The implementation of PeopleSoft Human Resources modules has added substantial functionality to campus operations that previously did not exist.
- Users now have the ability to easily retrieve data from the system.
- The development of Finance Web Tools as a front-end to the complex PeopleSoft Financial System has given the campus easy to use web access to real time information on budgets, expenditures, purchase orders and payments.

- The production of campus, CSU and State of California reports has been streamlined significantly because of the implementation of PeopleSoft modules.
- With the upgrade to web based Human Resources system, business processes are starting to rollout to the campus, examples of which include temporary faculty contracts and E-benefits.
- There has been greater cooperation among departments because of their working together on PeopleSoft, resulting in elimination of duplicate work and streamlining of business processes in many departments.

Sierra-Cedar's understanding of PeopleSoft and their focus on our success have made them a very effective implementation partner. Each of their consultants has provided great value to our institution. I highly recommend Sierra-Cedar to other institutions. The Readiness Assessment process enabled us to collect relevant information and opinions from project participants and campus-wide constituencies regarding the actual and perceived challenges and anticipated benefits of implementing the new software. The Sierra-Cedar consultants facilitated open discussion in the focus groups, listened to and interpreted opinions from individual interviews and synthesized it all into meaningful recommendations. As a result of following up on these recommendations, we refined our project planning, increased our communication efforts and realigned our staffing plan.

Stephanie Doda
Associate Vice President, I&IT

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