

Campus Abbreviations: **BA** Bakersfield; **CI** Channel Islands; **CHI** Chico; **CO** Chancellors Office; **DH** Dominguez Hills; **EB** East Bay; **FRE** Fresno; **FUL** Fullerton; **HUM** Humboldt; **LB** Long Beach; **LA** Los Angeles; **MA** Maritime Academy; **MB** Monterey Bay; **NOR** Northridge; **POM** Pomona; **SAC** Sacramento; **SB** San Bernardino; **SD** San Diego; **SF** San Francisco; **SJ** San Jose; **SM** San Marcos; **SLO** San Luis Obispo; **SON** Sonoma; **STA** Stanislaus.

1993	1994	1995	1996
<p><b>December</b> - CSU campus presidents meet to address the IT funding challenge as well as opportunities offered by rapid technological change. They agree that technology should not be considered merely a cost (or burden on the budget), but a strategic resource to be leveraged in support of the mission and goals of the university system.</p> <p><u>CSU Organizational Structure:</u> Chancellor: Barry Munitz Executive Vice-Chancellor: Molly Corbett Broad Assistant Vice-Chancellor for Information Resources and Technology: Tom West. Responsible for Information Technology initiatives, including the Integrated Technology Strategy Initiative that developed to include collaborative management systems and data center consolidation.</p>	<p><b>January</b> - Vice Chancellor, Business and Finance appointed (Richard West) (currently Executive Vice Chancellor and Chief Financial Officer) reporting to Executive Vice Chancellor. Information Technology initiatives were not under the purview of the Vice Chancellor for Business and Finance at this time.</p> <p><b>June</b> - Final California State University Budget Redesign report issued.</p> <p><b>December</b> - IBM Higher Education Consulting hired to support development of CSU's technology plan.</p>	<p><b>January</b> - First CSU/Governor's Compact (now Partnership) established regarding CSU Budget allocation process (1995/96 through 1998/1999).</p> <p><b>May</b> - Executive Director of Integrated Technology Strategy appointed (David Ernst) reporting to Assistant Vice-Chancellor for Information Resources and Technology (Tom West).</p> <p><b>May-December</b> - Integrated Technology Strategy planning process conducted throughout the CSU and campus legacy system cost data collected.</p>	<p><b>February</b> - Fresno State campus selected as the outsourcing site for the BMS data center previously housed at the CSU's WestEd facility in Los Alamitos.</p> <p><b>March</b> - Integrated Technology Strategy approved by the CSU Executive Council (campus presidents) and endorsed by the Board of Trustees.</p> <p><b>April</b> - Data Center Consolidation Task Force Established.</p> <p><u>Integrated Technology Strategies Initiative:</u> Building the Strategic Information Technology (I/T) Plan published by IBM Higher Education Consulting Group including initiatives for a Collaborative Management System and Streamlining Information Technology Delivery (data center consolidation).</p> <p><b>May</b> - Collaborative Management Systems Task Force established to investigate the replacement of existing financial management systems on campuses with collaborative financial management systems. This effort later became the "Common" Management System (CMS).</p>

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1996	1997	1997	1998
<p><b>July</b> - Senior Vice Chancellor for Business and Finance appointed (Richard West). There was no change in the reporting structure regarding CMS functions with this appointment.</p> <p>The Business Management Systems Oversight Committee was begun at the direction of the Chief Administrative and Business Officials (CABO). The Principles for Business Management Systems (July 1, 1997) described the BMS position in relation to new “collaboratives” developing within the CSU:</p> <p>“BMS services should be complimentary to the marketplace. . . The primary business opportunity in the future for BMS is in support of new collaboratives growing out of the CMS or other like initiatives.” BMS was viewed as one collaborative supporting the legacy applications on several campuses.</p> <p>The BMS data center was moved from the CSU’s WestEd facility to Fresno State University.</p> <p><b>November</b> - California State University Data Center Consolidation Feasibility Study completed by Pacific Partners Consulting Group at direction of Data Center Consolidation Task Force.</p>	<p><b>January</b> - Data Center Consolidation Feasibility Study presented to Commission for Institutional Management and Information Technology (CIMIT) that determined that any decisions on consolidation should be deferred until the system determined its direction on administrative software upgrades.</p> <p><b>May</b> - Request for Qualifications for ERP software – RFQ 960055 – Collaborative Management Systems (Phase 1 - Qualification).</p> <p><b>July</b> - Request for Qualifications for ERP software – RFQ 960055 – Collaborative Management Systems (Phase 2 - Discovery) (Oracle, SCT and PeopleSoft). Executive Vice-Chancellor resigns to become President of the University of North Carolina System.</p> <p><u>CSU Organizational Structure</u> Chancellor: Barry Munitz Senior Vice-Chancellor: Richard West Assistant Vice-Chancellor for Information Resources and Technology: Tom West – retained responsibility for Information Technology initiatives including the Integrated Technology Strategy Initiative. Executive Director of Integrated Technology Strategy (David Ernst).</p>	<p><b>November</b> - Request for Qualifications for ERP software – RFQ 960055 – Collaborative Management Systems (Phase 3 – Best Offer) (Oracle, SCT and PeopleSoft).</p>	<p><b>January</b> - Chancellor leaves CSU to become Chief Executive Officer of the Getty Foundation Trust (Barry Munitz).</p> <p><b>March</b> - New Chancellor Appointed (Charles Reed).</p> <p><u>CSU Organizational Structure</u> Chancellor: Charles Reed Senior Vice-Chancellor: Richard West Assistant Vice-Chancellor for Information Resources and Technology: Tom West – retained responsibility for Information Technology initiatives including the Integrated Technology Strategy Initiative. Executive Director of Integrated Technology Strategy: David Ernst.</p> <p><b>April-June</b> - Site visits conducted to SCT and PeopleSoft campuses in US.</p> <p><b>June</b> - CMS Analysis and Recommendations published. CIMIT recommends PeopleSoft as vendor of choice to Executive Council and they approve moving forward to negotiate with PeopleSoft.</p> <p><b>July</b> - Chancellor confirms CMS Task Force recommendation to award Collaborative Management Systems Bid Award to PeopleSoft. Negotiations begun for final agreement with PeopleSoft.</p> <p><b>August</b> - CMS Project Advisory Committee appointed.</p>

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1998	1999	1999	2000
<p><b>September</b> - Contract signed with PeopleSoft.</p> <p><b>November</b> - Executive Director of Integrated Technology Strategy (David Ernst) given full responsibility for CMS and Data Center Consolidation projects. Reported directly to Executive Vice-Chancellor for Business and Finance (Richard West). Assistant Vice-Chancellor for Information Resources and Technology retained responsibility for Telecommunications Infrastructure Initiative (TII) (Tom West).</p> <p><b>December</b> - Interim data center established at CSU WestEd location in Los Alamitos to begin PeopleSoft development work. PeopleSoft Consultants begin project planning including Project Charter.</p>	<p><b>January</b> - Executive Vice-Chancellor for Business and Finance and Chief Financial Officer appointed (Richard West). There was no change in the reporting structure regarding CMS functions with this appointment.</p> <p><b>February</b> - First RFP for PeopleSoft Consultants issues (Implementation Consulting Partner PeopleSoft ERP – RFP 980154). Assistant Vice-Chancellor for Information Resources and Technology Retires to become Executive Director of CENIC (Tom West).</p> <p><b>March</b> - Assistant Vice-Chancellor for Information Technology Services / CIO appointed (David Ernst). Assumes full responsibility for Information Technology Services including CMS and TII. CMS Senior Director appointed (Hilary Baker). <u>CSU Organizational Structure</u> Chancellor: Charles Reed Executive Vice-Chancellor: Richard West Assistant Vice-Chancellor for Information Technology Services: David Ernst Senior Director of Common Management Systems: Hilary Baker</p> <p><b>March</b> - HR Prototyping begins.</p>	<p><b>May</b> - Technology Steering Committee (TSC) requests development of alternative implementation approaches regarding CMS timeline.</p> <p><b>July</b> - Presidents affirm unanimous support of a single system-wide common management system. Letter to Award sent to 7 pre-qualified Implementation Consulting partners and process begun to establish Master Enabling Agreements with each firm.</p> <p><b>July-August</b> - Data Warehousing determined out of scope for CMS.</p> <p><b>August</b> - Implementation Steering Committee (ISC) adopts accelerated implementation timeline. Finance Prototyping begins. CMS Technical Architecture Committee Established .</p> <p><b>November</b> - First CSU Measures of Success Report published and delivered to Legislature setting framework for data collection and items to be measured.</p>	<p><b>January</b> - CMS Technical Architecture published.</p> <p><b>February</b> - CMS Director of Software Operations and Support Services (SOSS) appointed. CMS changed from “Collaborative” to Common Management System (CMS). <u>Baseline</u> (i.e. Finance 7.5 baseline, HR 7.6 baseline) adopted as the terminology to refer to the PeopleSoft Finance, Human Resources, and Student Administration products as delivered to the campuses by CMS.</p> <p><b>February</b> - Request for Qualifications for Data Center Services issued – RFQ 990099 Hardware Hosting and Operations Management.</p> <p><b>May</b> - CSU/Governor’s Compact renewed as Partnership for 1999/2000 – 2002/03.</p> <p><b>July</b> - CMS Director of Hardware Operations and Support Services (HOSS) appointed.</p> <p><b>August</b> - Letter of Intent for Bid Award to IBM.</p> <p><b>September</b> - HR 7.6 and Finance 7.5 Baseline software available to 1st wave campuses. Workshops held for campuses.</p> <p><b>October</b> - Chancellor’s Office CMS staff begin review of PeopleSoft Implementation Partners to select CMS PeopleSoft Student Administration Consultants for Central CMS implementation.</p> <p><b>November</b> - Second CSU Measures of Success Report published and delivered to Legislature establishing baseline measurements.</p> <p><b>December</b> - Cessation of Negotiations with</p>

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2001	2002	2003	2004
<p><b>January</b> - Open Negotiations with Unisys for Award of Data Center Services bid.</p> <p><b>February</b> - First campus (MA) goes live with HR 7.6 baseline.</p> <p>Hunter Group (later renamed Cedar) selected as CMS PeopleSoft Student Administration consultant.</p> <p>SA Pilot project begins with Fresno, Sonoma and CMA.</p> <p>Planning activities begin for HR 8.0 "Second Wave" campus implementations and "First-Wave" 7.5 to 8.0 upgrades.</p> <p><b>March</b> - New CMS Director of Software Operations and Support Services (SOSS) appointed.</p> <p>San Bernardino becomes the second campus live on HR 7.6 and first campus live on Finance 7.5.</p> <p>Contract signed with Unisys for Data Center Services.</p> <p><b>July</b> - Second RFP for CMS PeopleSoft Consultants issued (CMS PeopleSoft Consultants – RFP 010160).</p> <p>Eleven "first wave" campuses go live with HR 7.6 and Finance 7.5 in Unisys data center (EB, FRE, LB, LA, MAR, NOR, POM, SB, SJ, SLO, SON).</p> <p><b>November</b> - CMS PeopleSoft consultants list selected and published.</p> <p>Third <i>CSU Measures of Success</i> report published and delivered to Legislature, reporting first measurements against baseline.</p>	<p><b>February</b> - Three SA Pilot campuses (FRE, SON, MAR) complete HR 8.0 upgrades and go live with SA 8.0 for Admissions. HR/SA 8.0 Baseline software available to campuses. HRSA 8.0 Baseline Delivery Workshops held; 300+ campus representatives attend.</p> <p><b>March</b> - Planning begins for Finance 8.4</p> <p><b>June</b> - First "Second Wave" campus (CHI) goes live with Finance 7.5.</p> <p><b>July</b> - First "Second Wave" campuses (SM, CI, CHI) go live with HR 8.0.</p> <p><b>September</b> - Three SA Pilot campuses (FR, SON, MA) go live with the complete SA 8.0 baseline.</p> <p><b>October</b> - Three SA Close-Follower campuses (CI, NOR, POM) go live with SA 8.0 Admissions.</p> <p><b>December 2002</b></p> <p><b>Finance 7.5</b> Thirteen campuses (CI, CHI, EB, FRE, LB, MAR, MB, NOR, POM, SB, SJ, SLO, SON) and the CO are live on Finance 7.5</p> <p><b>HR 8.0</b> Twelve campuses (CI, CHI, FRE, LB, LA, MAR, NOR, POM, SB, SJ, SM, SON) and the CO are live on HR 8.0.</p> <p><b>SA 8.0</b> Five campuses are live on SA 8.0 (FR, LB, MAR, SJ, SON).</p>	<p><b>July</b> - An additional five campuses (BAK, MB, SAC, SLO, STA) go live on PeopleSoft HR 8.0.</p> <p>First two campuses (SLO, SJ) begin their Finance 7.5 to 8.4 upgrades.</p> <p><b>August</b> - Finance 8.4 Baseline Delivery Workshops are held; 250+ campus representatives attend.</p> <p><b>September</b> - Three SA "Close-Follower" campuses (CI, NOR, POM) go live with SA 8.0.</p> <p><b>October</b> - Chico goes live with SA 8.0 Admissions.</p> <p><b>December 2003</b></p> <p><b>Finance</b> - Seven campuses (CI, EB, FR, MB, NOR, POM, SB) plus the CO are live on 7.5 Seven campuses (CHI, LB, MAR, SAC, SJ, SLO, SON) are upgrading from 7.5 to 8.4; Five campuses (BAK, HUM, LA, SF, SM, STA) are implementing directly in 8.4.</p> <p><b>HR 8.0</b> - Twenty campuses (BAK, CI, CHI, EB, FRE, HUM, LB, LA, MAR, MB, NOR, POM, SAC, SB, SF, SJ, SM, SLO, SON, STA) plus the CO are live on HR 8.0.</p> <p><b>SA 8.0</b> - Eight campuses are live on all or part of the SA 8.0 baseline (CI, FR, LB, MAR, NOR, POM, SJ, SON).</p>	<p><b>May</b> - Planning begins for new 2006 Data Center Services contract.</p> <p>Benefits Administration Campus Collaborative project begins.</p> <p><b>July</b> - All campuses originally on Finance 7.5 are now in process or complete with their upgrades to 8.4.</p> <p><b>September</b> - Planning begins for combined Human Resources and Student Administration HCM 8.9 product.</p> <p><b>December 2004</b></p> <p>CMS takes delivery of HCM 8.9 product which combines the previously split HR 8.0 and SA 8.0 product line into a single database.</p> <p><b>HR 8.0</b> One additional campus (FUL) is implementing HR 8.0, bringing the total this year up to twenty campuses plus the CO.</p> <p><b>Finance 8.4</b> Eighteen campuses (BAK, CI, CHI, EB, FRE, HUM, LB, LA, MAR, MB, NOR, SAC, SB, SF, SJ, SM, SLO, SON) and the CO are live ; two additional campuses (STA, POM) will be live by February.</p> <p><b>SA 8.0</b> Nine campuses are live on all or part of SA 8.0 (CI, FR, LB, MAR, NOR, POM, SJ, SON).</p>

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2005	2006	2007	2008
<p><b>January</b> - First campus goes live with Benefits Administration (campus collaborative project).</p> <p><b>February</b> - HR and SA Fit-Gap sessions begin for the HCM 8.9 upgrade.</p> <p><b>May</b> - Requirements gathering begins for implementing Absence Management.</p> <p><b>August</b>- CMS takes delivery of the Finance 8.9 product. After review, the decision is made to skip version 8.9 and utilize 9.0 for the next Finance upgrade.</p> <p><b>September</b> - Contract signed with Unisys for provision of new Data Center Services through September 2009.</p> <p><b>November</b> - Shared HCM 8.9 prototype database released to campuses.</p> <p><b>December 2005</b></p> <p><b>Finance 8.4</b> One additional campus (DH) prepares to start Finance 8.4 implementation in January, bringing the total number of campuses on 8.4 to twenty-one, plus the CO.</p> <p><b>HR 8.0</b> Twenty-one campuses plus the CO are live on HR 8.0; the last two campuses (DH and SD) will begin their initial HR implementations directly in version 8.9, starting next month.</p> <p><b>SA 8.0</b> Ten campuses (CI, CHI, FR, LB, MAR, NOR, POM, SJ, SON, STA) are live on SA 8.0. Three campuses (EB, SAC, SB) have begun implementation activities.</p>	<p><b>February</b> - CMS launches new Technical Upgrade Services. HCM 8.9 upgrades begin for all campuses.</p> <p><b>February</b> - Campus Data Center Transitions begin. Pilot campus moves to the new Data Center are complete (SLO, FRE, CO).</p> <p><b>May</b> - All campus migrations to the new Data Center are complete.</p> <p>HCM 8.9 Delivery Workshops are held; 325+ campus representatives attend.</p> <p><b>August</b> - Last campus goes live with HCM 8.9. All 23 campuses plus the CO are now live on the CMS HR Baseline.</p> <p><b>December 2006</b></p> <p>CMS takes delivery of Finance 9.0 product</p> <p><b>Finance 8.4</b> One additional campus (FUL) is completing their implementation, bringing the total number live on 8.4 to twenty-two campuses, plus the CO.</p> <p><b>HCM 8.9 Upgrades</b> Five campuses (SJ, SB, EB, SAC, FR) have completed the HCM 8.9 upgrade.</p> <p><b>HCM 8.9 SA Implementations</b> Fifteen campuses (CI, CHI, FRE, LB, LA, MAR, NOR, POM, SJ, SLO, SON) are live on all or part of the Student Administration product.</p>	<p><b>Jan-June</b> - An additional 16 campuses (SON, SM, POM, STA, FUL, CHI, SF, MB, BAK, LB, HUM, NOR) complete the Human Resources HCM 8.9 upgrade.</p> <p><b>March</b> - Design sessions begin for Finance 9.0 upgrade.</p> <p><b>November</b> - CMS Central Upgrade Services begins Finance 9.0 technical upgrade for SLO (beta campus).</p> <p><b>December 2007</b></p> <p><b>Finance 8.4</b> Twenty-one campuses plus the CO are live on Finance 8.4</p> <p><b>Finance 9.0</b> SLO (beta campus) has begun Finance 9.0 upgrade activities.</p> <p><b>HCM 8.9 Upgrades</b> Twenty campuses and the CO have completed the HCM 8.9 upgrade.</p> <p><b>HCM 8.9 SA</b> Twenty-one campuses are live on all or part of the Student Administration product.</p>	<p><b>February</b> - CMS Central Upgrade Services completes all HR and SA 8.0 to HCM 8.9 technical upgrades. All 23 campuses and the Chancellor's Office are now live on the CMS Human Resources HCM 8.9 Baseline and twenty-one campuses are live on all or part of the Student Administration HCM 8.9 Baseline.</p> <p><b>February</b> - Finance 9.0 Delivery Workshops are held; 250+ campus representatives attend.</p> <p><b>March</b> - CMS Central Upgrade Services begins Finance 9.0 technical upgrade for all campuses.</p>