

**Columbia University  
People @ Columbia (PAC) Project**

**Human Resources  
Management Committee**

**September 17, 2004**

# Agenda

- **Recent Accomplishments**
- **Go-Live Readiness**
- **Stabilization**
- **Support Scenarios**
- **Hours of Operation**
- **Post Go-Live Communications**
- **Contact Information**

# PAC Recent Accomplishments

## ➤ **Change Management, Training & Communications – On Track**

- ✓ Manager Self Service Learning Labs - Complete
- ✓ HR/Benefits/Payroll Training - Complete
- ✓ MSS Readiness Seminars - Complete
- ✓ August Newsletter Distributed – Complete
- ✓ September Newsletter – In the Mail
- ✓ Palm Cards – In the Mail
- ✓ Top 10 Communications – In Process

## ➤ **Implementation Phase – On Track**

- ✓ Product Testing – Complete
- ✓ Dress Rehearsal for Production – Complete
- ✓ Data Cleansing – In Progress
- ✓ Payroll Parallel Testing Results – Complete

## Go-Live Preparation for Departments

Deadline/Action Date	Description
<b>Thursday, August 19<sup>th</sup></b>	Deadline for PAFs either extending or terminating all appointments with a salary end date of 6/30/04 or 7/31/04.
<b>Friday, September 3<sup>rd</sup></b>	Deadline for new appointments, reappointments and changes for all academic personnel and staff (submission to CUMC Office of Faculty Affairs and Human Resources Service Managers and Administrators).
<b>Wednesday, September 8<sup>th</sup></b>	Deadline for Morningside academic appointments, reappointments and changes (submission to the Provost's Office).
<b>Thursday, September 9<sup>th</sup></b>	Deadline to submit all data corrections to turnaround PAFs.
<b>Monday, September 13<sup>th</sup></b>	Final deadline for all remaining transactions to be entered in PIS for conversion to PeopleSoft (submission to the Provost's Office, the CUMC Office of Faculty Affairs, and Human Resources Service Managers and Administrators).
<b>Thursday, September 23<sup>rd</sup></b>	<p>Freeze date in PIS and BIS. The data as of September 23<sup>rd</sup> in PIS will be used for the following:</p> <ul style="list-style-type: none"> <li>• University's paper directory for Academic Year 2004-2005</li> <li>• September Monthly Payrolls</li> <li>• Final conversion of Employee data since 7/1/2002 to PeopleSoft</li> <li>• Governmental reports</li> </ul>
<b>Monday, October 4<sup>th</sup></b>	Processing begins in PeopleSoft. Begin entering "Backlog" of PAF transactions. .PeopleSoft Manager Self Service and Employee Self Service are available on-line directly via MyPortal.

# Go-Live Readiness Activities

## **1. Make sure all staff has activated their UNI and password**

- ▶ Ensure Password Security
  - ▶ Set a strong password (passwords will expire every 90 days)
  - ▶ Do not use transmission methods and locations that are not secure
    - ▶ Telnet, FTP, POP, e.g. Internet Café, external conference kiosks, CU library kiosks

## **2. Ensure all faculty and staff have connectivity**

## **3. Review the recommended technical specifications sent in #7 of Top 10 Communications**

## **4. Monitor the new Payroll calendars for changes in pay cycles**

## **5. Submit Personnel Action Forms (PAF's) prior to deadlines**

- ▶ The backlog will be addressed in priority of Payroll schedule
- ▶ Any PAF that does not make it into the normal schedule will be paid in the off cycle.
- ▶ Work study PAF's that are not submitted on time by 9/13, but received by HRPC before 9/30, will be delayed until late October, 2004

# Readiness: Department Administrators

## ▶ Current

- MSS Training
- PAF Handbook
- Practice Database
- Readiness Seminars
- Top 10 emails
- One-on-One meetings and multiple presentations throughout Phase I

## ▶ Future

- Each DA will receive a 1 page quick reference guide about End user support
- Receive a list of FAQs that have been compiled during training, and updated weekly during stabilization
- Delivery Confirmation

# Upcoming Readiness Seminars

**Manager Self Service Readiness Seminars will review pertinent course materials, provide a final forum for users to have any remaining questions answered, and allow the PAC Project to present important go-live reminders.**

## **Medical Center Readiness Seminars**

<b><i>Date</i></b>	<b><i>Time</i></b>	<b><i>Room</i></b>
Friday, September 17	12:00-2:00pm	Alumni Auditorium (1st Floor, Between P&S Black Building)

## **Morningside Readiness Seminars**

<b><i>Date</i></b>	<b><i>Time</i></b>	<b><i>Room</i></b>
Friday, September 17	3:00-5:00pm	501 Schermerhorn

# Post Go-Live Employee Support Labs

Employee Support Labs are walk-in sessions that are available to all faculty and staff. All Faculty & Staff can attend any session to get answers to their questions about accessing Employee Self Service, their Pay Statements and their Benefits.

## Morningside Employee Support Labs

<i>Date</i>	<i>Time</i>	<i>Room</i>
Wednesday, October 6	12:00-2:00pm	321A International Affairs
Wednesday, October 13	12:00-2:00pm	321A International Affairs

## Medical Center Employee Support Labs

<i>Date</i>	<i>Time</i>	<i>Room</i>
Friday, October 8	12:00-2:00pm	PH17
Friday, October 15	12:00-2:00pm	PH17

# Stabilization Period

## **Stabilization Period - *October 4, 2004 to December 31, 2004***

- ▶ Stabilization period used to fix any identified processes or functionality that does not work as expected, and to support core users and faculty and staff.
- ▶ Only critical and high priority issues that impede the University from conducting its business are addressed during the stabilization period.
- ▶ Industry experience with enterprise-wide deployments of HRMS systems reveal that it takes at least 3 months to stabilize system processes.
- ▶ Development on enhancements is deferred until after Stabilization (after 1/1/05).

## **Creation of the New Human Resources Processing Center (HRPC)**

- ▶ Support includes HR Process Center for HR and Payroll transacting.
- ▶ Staffed with live Help Desk Operators to triage issues to appropriate group for resolution.

# Stabilization Support - 3 Tiers

## **Tier 1 – The first point of contact for end users.**

- ▶ Provides basic functional and/or technical support.
- ▶ Troubleshoots issues using scripts to determine the nature of the problem.
- ▶ Redirects issues to peer Tier 1 support facilitators.
- ▶ Communicates resolution to end users.




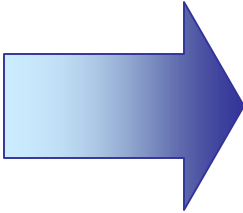
## **Tier 2 – Will investigate issues that are escalated from Tier 1.**

- ▶ Accepts ownership of issues from Tier 1.
- ▶ Investigates, attempts to resolve and communicates resolution back to Tier 1.
- ▶ Escalates issues that cannot be resolved to Tier 3.
- ▶ Works directly with end user to resolve issue where appropriate.
- ▶ Provides University knowledge regarding policies and procedures.

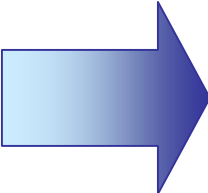
## **Tier 3 – The “owners” the PeopleSoft application.**

- ▶ Accepts ownership of issues from Tier 1 and Tier 2.
- ▶ Determines updates to the PeopleSoft system (configuration, patches, updates, bug fixes).
- ▶ Provides deep and broad knowledge of the application and University policies.
- ▶ Develops new reports and queries.
- ▶ Communicates system status and outages to Tier 1, Tier 2 and end users.
- ▶ Responsible for communicating to support vendors.
- ▶ Adds and removes user access to the application.

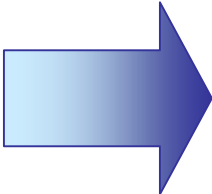
# Tier 1 Support

Support Group	Responsibilities	Tier 2 Escalation		
Tier 1	Provides Basic Functional and Technical Support		Group	Method
<b>FSS Administrators</b>	Troubleshoots employee's benefit related issues.		<ul style="list-style-type: none"> <li>▪ FSS Manager</li> <li>▪ RSS Manager</li> </ul>	Phone/Email
<b>Departmental Supervisors, Managers and Administrators</b>	Manages personnel related issues, and HR/Payroll transactions for employees within their department.		<ul style="list-style-type: none"> <li>▪ HR Service Managers</li> <li>▪ Provost Office/Office of Faculty Affairs</li> </ul>	Phone/Email
<b>HRPC Help Desk Analysts</b>	Provides end users basic functional support for Columbia University's processes and PeopleSoft HRMS application-specific issues.		<ul style="list-style-type: none"> <li>▪ HR Service Managers</li> <li>▪ HRPC Managers</li> <li>▪ Payroll Manager</li> <li>▪ Provost's Office</li> </ul>	Phone/Email
			<ul style="list-style-type: none"> <li>▪ Integration Manager</li> </ul>	Email
<b>AcIS Help Desk</b> <i>(Morningside, Lamont, Nevis)</i>	Provides end users basic technical support. <i>(UNI/Password reset, printing and connectivity, etc.)</i>		<ul style="list-style-type: none"> <li>▪ Integration Manager</li> </ul>	Email
<b>CUMC Desk</b> <i>(Medical Center)</i>	Provides end users with basic technical support (hardware/software) for the CUMC community.			
<b>Department Desktop Technical Coordinator</b>	Provides desktop and basic technical support (hardware/software) to employees within their department.			

# Tier 2 Support

Support Group	Responsibilities	Tier 3 Escalation		
Tier 2	Manages PeopleSoft Processes <i>(Data entry, Maintenance, Payroll Processing and Position Management)</i>		Group	Method
<b>FSS Manager</b>	Provides support regarding insurance questions (Life, Medical, Dental, TPRP)		Integration Manager	Email
<b>RSS Manager</b>	Processes retiree TDAs; pensions and savings plans			
<b>HR Service Managers (MS) HR Administrators (CUMC)</b>	Liaison to departmental managers, supervisors and administrators. Manages position management, recruitment and hiring processes for Administrative personnel.			
<b>Provost Office</b>	Sets policy for academic personnel, approves academic HR/PY transactions. (ie Appointments, payments, tenure, LOA, etc.)			
<b>HRPC Manager</b>	Manages the HRPC Help Desk.			
<b>Payroll Manager</b>	Manages Payroll transactions processing.			

## Tier 3 Support

Support Group	Responsibilities	Escalation		
<b>Tier 3</b>	<b>Resolves application issues and issues escalated from Tier 1 and Tier 2</b>		<b>Group</b>	<b>Method</b>
<b>PeopleSoft Project Director</b>	Determines final scope/phasing of system changes		Management Committee	Bi-Weekly Status/Issues Meeting
<b>HR/BN/PY Business Process Owners</b>	Resolves functional design issues escalated from Tiers 1 & 2.			
<b>Enterprise Infrastructure Manager</b>	Resolves technical design issues escalated from Tiers 1 & 2.			
<b>Integration Manager</b>	Receives all inbound correspondence escalated to Tier 3; logs all issues in STAT; coordinates the resolution and response to inbound inquiries.			
<b>Application Manager and Developers</b>	Resolves technical issues relating to configuration, application maintenance and upgrades.			
<b>Application Security Manager</b>	Assist in managing and configuring the PeopleSoft software and assists in the migration of configuration tables across versions of the software			

# Available Resources

## **Personal Information, Employment Information, Payroll**

Please contact your Supervisor, Manager, or Department Administrator for assistance.

## **Human Resources Process Center Help Desk:**

- ▶ Phone: 212-851-2888 Email: [hrpc@columbia.edu](mailto:hrpc@columbia.edu)

## **Benefits**

### **Morningside, Lamont & Nevis Campuses — Faculty & Staff Services**

- ▶ Phone: 212-870-3074 Email: [hrfss@columbia.edu](mailto:hrfss@columbia.edu)
- ▶ Web: <http://www.hr.columbia.edu/hr/>

### **Medical Center Campus — Human Resources**

- ▶ Phone: 212-305-3819 Web: <http://www.cumc.columbia.edu/hs/hr/>

## **Security Access, UNI ID/Password, Desktop Computer Issues**

### **Morningside, Lamont & Nevis Campuses — AcIS Help Desk**

- ▶ Phone: 212-854-1919 Email: [consultant@columbia.edu](mailto:consultant@columbia.edu)
- ▶ Web: <http://www.columbia.edu/acis/support/>

### **Medical Center Campus — CUMC Help Desk**

- ▶ Phone: 212-305-4357 Email: [5-help@columbia.edu](mailto:5-help@columbia.edu)
- ▶ Web: <http://www.cubhis.org/5help.html>

# Stabilization Communication via Email

In order to ensure appropriate tracking and resolution of issues, we are asking for some standard formats around email communication from Tier 1 and Tier 2 to Tier 3.

Specifically, we are requesting the following:

- ▶ Employee ID
- ▶ Employee DOB
- ▶ Description of the Issue
- ▶ Steps Taken to Generate/Recreate the issue
- ▶ Screen Shot if Applicable

Do **not** send the following in an email:

- ▶ Social Security Number
- ▶ Personal Employee Information e.g. name and salary

**When you call the HRPC Help Desk you can expect to be authenticated before the analyst will assist with specific account information.**

- ▶ DA – *Employee ID or last 4 digits of SSN, and DOB*
- ▶ Employee – *Employee ID or last 4 digits of SSN, and DOB*
- ▶ DA on behalf of an employee – *Employee ID or last 4 digits of SSN, and DOB for both the DA and the employee*

# Go-Live Impact on Departments

## Volume / Type of Calls Received

- ▶ Users requesting UNI/Password
- ▶ Users requesting remote access
- ▶ Increased calls about payroll deductions
- ▶ Questions about the new myColumbia portal

## Where to Communicate Issues

- ▶ We will be encouraging employees to work with their supervisor, manager, and departmental administrator for assistance
- ▶ Issues that cannot be resolved should be directed to the next tier.

## When to Contact P@C Directly (during Stabilization Phase Only)

- ▶ System-wide technical issues
- ▶ You believe that the system is down.

# Scenario 1 – Calls to the HRPC Help Desk

## Employee Calls HRPC Help Desk

- ▶ When I access PeopleSoft ESS, the system is very slow, especially when I navigate from page to page.
  - *Once the HRPC Help Desk Analyst determines that the performance issue is isolated to the employee's PC, the employee is referred to local desktop support. These technical help desks will troubleshoot the hardware/software issue.*
  
- ▶ Employee's 403(b) deduction is incorrect.
  - *The HRPC Help Desk Analyst will refer the employee to FSS.*

## DA Calls HRPC Help Desk

- ▶ Where can I find a listing of department's monthly employees who were paid via direct deposit?
  - *Help Desk Analyst will direct the DA to the Payroll Register in MSS.*
  
- ▶ My employee, John Smith, believes his 403(b) deduction is incorrect.
  - *HRPC Help Desk Analyst will inform the DA that the employee should contact FSS to discuss the matter.*

## Scenario 2 - Calls to the HRPC Help Desk

### Employee Calls HRPC Help Desk

- ▶ A direct deposit advice is posted in PeopleSoft's ESS; however, the money was not deposited in my bank account.
  - *Refer employee to HRPC Manager (Tier 2). The HRPC Manager may work with the Payroll Manager to resolve issue.*
  
- ▶ I can't remember my network password.
  - *Refer employee to AclS Help Desk to reset password.*

### DA Calls HRPC Help Desk

- ▶ I submitted a PAF to change an employee's salary to \$45k annually. In PeopleSoft, the employee's salary is \$48k annually.
  - *HRPC Help Desk Analyst will escalate to HRPC Manager to resolve and update system if necessary.*
  
- ▶ An employee was not paid. How do I obtain a off-cycle check?
  - *Escalate to Payroll Manager for analysis and review.*

## **Scenario 3 – Calls to the AcIS Help Desk**

**A DA is recently hired in the Business School and can not access PeopleSoft. As a first step, the DA calls the AcIS Help Desk.**

### **AcIS Help Desk**

- ▶ Determines the DA's UNI and password are active and the issue is not related to their hardware/software configuration.
- ▶ Logs issue in remedy and escalates to the HRPC Help Desk Analyst via email.

### **HRPC Help Desk Analyst**

- ▶ Determines the DA has been entered correctly in PeopleSoft as a departmental administrator for the Business School.
- ▶ Logs the issue in the Issue Log and escalates to the HRPC Manager.

### **HRPC Manager**

- ▶ Reviews the DA's data in PeopleSoft and the original PAF document.
- ▶ The HRPC Manager believes the issue may be PS security related and escalates to the Integration Manager.

## Scenario 3 Continued

### Integration Manager

- ▶ Reviews issue and previous troubleshooting steps.
- ▶ Consults with Business Process Owners to validate PeopleSoft security access that should be granted to DA.
- ▶ Consults with Application Security Manager to ensure correct access has been granted to employee and is active. Determination is that DA's PeopleSoft access was incorrect. Application Security Manager corrects access in PeopleSoft and notifies Integration Manager.
- ▶ Updates Issue Log with resolution and notifies HRPC Manager and HRPC Help Desk Analyst.

### HRPC Help Desk Analyst

- ▶ Communicates resolution to DA and confirms issue has been resolved to DA's satisfaction.

## Scenario 4 – Calls to Tier 1

**A DA call the help desk to request a change to the department's earnings register.**

- ▶ The HRPC help desk analyst asks the DA several questions to determine if there is an error with the report.
- ▶ The analyst concludes that the report is working as expected.
- ▶ The analyst logs the enhancement request and informs the DA that all enhancements are being deferred until after the stabilization period.
- ▶ The analyst escalates the issue to the Integration Manager, who logs the issue in STAT.

# What We Learn Through the Support Approach

Issues that are received at the HRPC help desk and the PAC mail box will be monitored to determine areas for improvement. We will be able to:

- ▶ Confirm HRPC Operational Procedures
- ▶ Identify Departments that Need Additional Assistance or Training
- ▶ Identify DAs that Need Additional Assistance or Training
- ▶ Review issues received for further communication
  - DA Seminar/newsletter/mailing
  - Employee Seminar/newsletter/mailing
  - Training Post Card
  - News Flash

# Stabilization Hours of Operation

During the Stabilization period system availability hours will be limited in order to allow for migration of fixes and adequate batch processing time. The hours of operation will be extended once the application has reached adequate stabilization.

## Stabilization System Availability

### HRMS Application

Monday – Friday: 8:00 am – 5:00 pm

Monday – Friday: 9:00 pm – 5:00 am

### Reporting

Monday – Friday: 8:00 am – 9:00 pm

Saturday: 8:00 am – 5:00 pm

## HRPC Help Desk Hours of Operation

Monday – Friday 9:00 am – 5:00 pm

Phone: 212-851-2888 Email: [hrpc@columbia.edu](mailto:hrpc@columbia.edu)

Mailing Address: 330 5<sup>th</sup> Avenue, 11Floor, MC 3202

## **Post Go-live Communications**

- ▶ **Go Live Announcement (10/4)**
- ▶ **Weekly FAQs to DAs**
- ▶ **Delivery Confirmation**
- ▶ **Daily Status Meetings**
- ▶ **Status Report**
- ▶ **System Unavailable (issues)**

## ***How to Obtain Information on the PeopleSoft Project***

- 1. Email comments and questions to [PAC@Columbia.edu](mailto:PAC@Columbia.edu)**
- 2. View the Project Website for project information: [www.columbia.edu/cu/pac/](http://www.columbia.edu/cu/pac/)**
- 3. Contacts**
  - Project Director: Lynne Gere**
    - (212)851-2912
    - [Ig2193@columbia.edu](mailto:Ig2193@columbia.edu)
  - Communications Liaison: Joseph Harney**
    - (212)854-1540
    - [jh2087@columbia.edu](mailto:jh2087@columbia.edu)