

**Columbia University
PeopleSoft PAC Project
PeopleAdmin JAC Project**

**Human Resources
Management Committee**

January 29, 2004

Agenda

- **People @ Columbia vs. Jobs @ Columbia**
- **People @ Columbia Recent Accomplishments**
- **People @ Columbia Timeline**
- **Jobs @ Columbia Recent Accomplishments**
- **Jobs @ Columbia Timeline**
- **University Feedback – FAQs**
- **People @ Columbia Reporting Approach**
- **Employee & Manager Self-Service Functionality**
- **People @ Columbia Self-Service Demonstration**
- **Jobs @ Columbia Demonstration**
- **Other HR Topics**

People @ Columbia vs. Jobs @ Columbia (PAC vs. JAC)

- **People @ Columbia = PeopleSoft Project for Phase I**
 - **Human Resources**
 - **Benefits**
 - **Payroll**
 - **Employee Self Service**
 - **Manager Self Service (Limited)**

- **Jobs @ Columbia = PeopleAdmin Project**
 - **Recruiting**

People @ Columbia – Recent Accomplishments

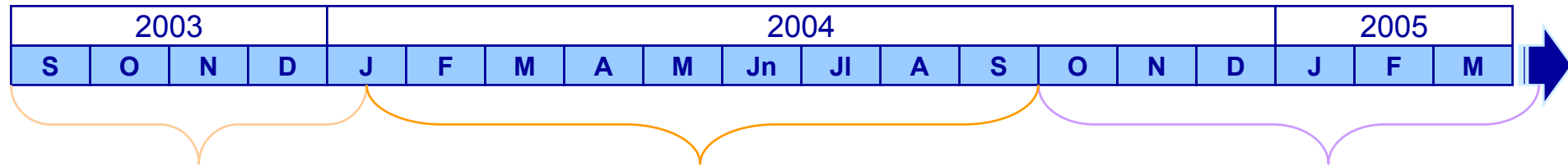
- **Design – Blueprints for PeopleSoft Requirements Completed**
 - ✓ Completed 47 Conversion Designs
 - ✓ Entered Configuration Data for 181 tables
 - ✓ Completed System Design
 - *66 Reports*
 - *57 System Interfaces*
 - *23 On-Line Enhancements*

- **Change Management, Communications & Training Design**
 - ✓ Training Approach Completed
 - ✓ Self Service Communications Approach Completed
 - ✓ PeopleSoft access via the University Portal (uPortal) Approach in progress
 - ✓ PeopleSoft access via Kiosk Approach in progress

- **Technical Infrastructure Design**
 - ✓ Infrastructure Design
 - ✓ Reporting Approach in progress
 - ✓ Security Approach in progress

- **Implementation Phase**
 - ✓ Began Data Conversion
 - ✓ Began Systems Development
 - ✓ Began Test Planning

People @ Columbia - Phase I (2003-2005)



Technical Upgrade
 * Upgrade Tech Environment to Current PS Version

Design & Configuration
 * Business Process Validation
 * Design Reports, Interfaces, Modifications



The **completion of the design phase** means no additional functionality will be created for the initial implementation of PeopleSoft HRMS unless required for legal/regulatory purposes.

Build & Test
 *Build System Reports, Interfaces, Modifications
 *Test System

Develop & Deliver Training
 *Develop Training Materials and Scenarios
 *Deliver Training and Support Practice Environment

Conversion & Deployment
 *Convert Employee Data to PeopleSoft
 *End User Assurance



Go-Live!
 4th Quarter
 2004

Post-Production & Operations Support
 * Maintain System
 * Develop Enhancements



Operations Support will start approximately 3 months after go-live and continue throughout the life of PeopleSoft. Requests for additional reports, interfaces and functionality will be prioritized for deployment approximately 3 months after go-live.

 = Completed Tasks
 = Outstanding Tasks

Jobs @ Columbia – Recent Accomplishments

- **Application and Implementation Design – Applicant and Manager Site Reviews Completed**
- Functional assessment completed; modifications being finalized
- Implementation strategy outlined
- Reporting strategy in progress
- **Change Management/Communications/Training Design**
 - ✓ Training Approach Completed
 - ✓ Communications Approach Completed
 - ✓ JAC access via the University Portal (uPortal) development in progress
 - ✓ JAC access via Learning Lab approach completed
- Distributed site kiosk development in progress
- Partnering with community groups in progress.
- **Technical Infrastructure Design**
 - ✓ WIND authentication in progress
 - ✓ Position data conversion and maintenance in progress

Jobs @ Columbia - Timeline (2003-2004)

2003							2004						
Jn	Jl	A	S	O	N	D	J	F	M	A	M	Jn	Jl

Needs Assessment
 * Select Job Posting & Applicant Tracking System
 * Review System Functions

Design & Configuration
 * Initial Functional Modifications

There was a hiatus for contract finalization with vendor.



Design & Config
 *Final Functional Modifications

Develop & Deliver Training and Communications
 *Develop Training Materials
 *Deliver Communications

Build & Test
 *Finalize system modification
 *Test System

Deployment and Pilot
 *Transition from Old Systems
 * Initial Rollout
 *End User Assurance

Post-Production & Operations Support
 *Maintain System
 *Develop Enhancements
 * Confirm changes in policy and approach

 = Completed Tasks
 = Outstanding Tasks

University Feedback - FAQs

1. Will we be able to view Salary and Additional Compensation via self-service?

- You will be able to see salary information. You will not be able to see additional compensation information. However, you will be able to see additional compensation on the Department Payroll Register and the Department Earnings Register.

2. Will casual employees be maintained in PeopleSoft? If yes, how will they be converted and maintained?

- All employees currently active or terminated after 6/30/02, will be converted into PeopleSoft, including casual employees.
- No additional data is needed to convert the casual employees.
- Time for casual employees will be entered via FFE.

3. Will the Roster process change?

- The Roster process will remain the same for 0 Salary, Annual Recertification and Off-Cycle Rosters.
- Union Rosters will not exist. Departments/Schools will receive a communication noting the labor agreement increase amount and effective date.

4. Will all individuals with access to Manager Self-Service be able to view the Salary information for employees in his/her department?

- Yes, all individuals with access to Manager Self-Service will be able to view the Salary information of employees in his/her department.

5. Will the approval process change?

- No, the approval process will not change. Each school/department will continue to follow the same approval process as they do today.

University Feedback - FAQs

6. Will we provide employee self-service communications in multiple languages?

- We will provide employee self-service communications/training material in English and Spanish.

7. How will position numbers be created in PeopleSoft? Will PeopleSoft maintain PRS, PRQ and shadow system position numbers?

- PeopleSoft position numbers are auto-generated for Administrative and Professional Library Positions.
- PeopleSoft position numbers are smartcoded for all other Academic Positions.
- PeopleSoft will not maintain PRS, PRQ or shadow system position numbers. If a school/department needs this information, they will need to maintain it in a separate system/process.

8. Have Unions been contacted regarding changes in the system?

- Labor Relations is working with the unions regarding changes to the central organization.
- The project team and labor relations will be meeting with each union to discuss changes that may impact union members.
- Project communications will be sent to employees regarding changes, such as employee self-service and the changes with direct deposit advices.

9. How will the project help support department administrators with faculty who are adverse to printing their own direct deposit advices?

- The Provost will send a communication to all faculty notifying them of the self-service aspect of viewing/printing their direct deposit advices.
- Palm cards will be created with instructions for accessing pay stubs and a description of changes to the pay stubs. Department Administrators will be able to distribute these palm cards in place of advices.

University Feedback - FAQs

10. Can you describe the process to update employee data in the system?

- The Department Administrator will print the pre-populated Turnaround PAF for the employee.
- The DA will update the necessary information and send the Turnaround PAF through the appropriate approval process with the ETC! as its ultimate destination.
- The ETC! will update PeopleSoft with the information on the Turnaround PAF.
- The DA will look at the Job Summary information to verify the data was updated correctly. If the data is not correct, depending on the type of error, the DA may communicate with the ETC! or print another Turnaround PAF and make the necessary changes.

11. Will Turnaround PAFs be sent to the department/school from the ETC!?

- No, Turnaround PAFs will not be sent from the ETC! to the department/school. DAs will have the ability to look on-line to verify changes and/or run the PAF Actions Report.

12. I inquired about a certain type of report to see if it could be provided via PeopleSoft. How can I find out the outcome?

- The PAC team has received many requests for reports. We needed to minimally replicate that which is still required out of the legacy HRMS systems, and we gained many more reports delivered from PeopleSoft. We also created some commonly requested reports which were needed by all departments.
- To learn the status of your particular report request, send an email to PAC@columbia.edu with the type of report requested and we will provide the status of its disposition.

University Feedback – What's Payroll vs LDS?

	PeopleSoft Payroll System	Labor Distribution System
Function	<ul style="list-style-type: none"> ◆ Calculates employees' gross payroll based on hours, salary and additional compensation. ◆ Deducts taxes, benefits and general deductions to calculate employees' net payroll. 	<ul style="list-style-type: none"> ◆ Distributes employees' gross payroll across specified accounts ◆ Calculates fringe expenses and charges to appropriate accounts. ◆ Maintains budget information for each account.
Data	<ul style="list-style-type: none"> ◆ Regular and Overtime Hours ◆ Salary Information ◆ Additional Compensation Amounts 	<ul style="list-style-type: none"> ◆ Accounts/Sub-codes ◆ Payroll Expenses Distribution ◆ Budget Information
Reports	<ul style="list-style-type: none"> ◆ Department Payroll Register ◆ Department Earnings Register ◆ PAF/Nomination Form ◆ PAF Actions Report 	<ul style="list-style-type: none"> ◆ PAD

PAC Reporting Approach

- Desktop query tools can provide you with the ability to access data via the Data Warehouse.
- Trained “Super User” Reporters will respond to requests for complex reports using Data Warehouse or PeopleSoft Query Tool
- For more information on data stored in the Data Warehouse and Data Warehouse query tool training, please visit the Data Warehouse website at <https://dwr.ais.columbia.edu/info>

	Departmental Administrators	Back-Office (Central) Users
Delivered / Built	<ul style="list-style-type: none"> ◆ PeopleSoft Manager Self-Service PAF Department Payroll Register Department Earnings Register PAF Actions Report ◆ Distributed Visa Expiration Appointment End Date 	<ul style="list-style-type: none"> ◆ PeopleSoft HRMS Production Database Approximately 148 Delivered Reports Approximately 66 Custom Reports
Ad-hoc (Basic)	<ul style="list-style-type: none"> ◆ Data Warehouse Email Lists Address Lists Tracking Support Staff and Overtime Department Employee Listing 	<ul style="list-style-type: none"> ◆ PeopleSoft HRMS Reporting Database Query Access ◆ Data Warehouse Brio
Ad-hoc (Complex; Requires Additional Security Access)	<ul style="list-style-type: none"> ◆ Report Request to HRIS Analysis/Strategic Planning Reports Address/Email Lists Cross University Salary Planning Salary History Employee Informational Data 	<ul style="list-style-type: none"> ◆ PeopleSoft HRMS Reporting Database Query Access ◆ Data Warehouse Brio

PAC Employee and Manager Self Service Functionality

- Phase I Self-Service functionality will be very similar to today with the addition of paycheck information ability to update direct deposit information, update federal W-4 information and print Turnaround PAFs.

Self Service Functionality	PeopleSoft Audience & Access		Current Self-Service
	Employee	Manager	
Personal Information			
Home/Mailing Address	Edit	Edit	Yes
Phone Numbers	Edit	Edit	Yes
Emergency Contacts	Edit	Edit	Yes
Email Address	View	View	Yes
Benefits Summary			
Benefit Plan Enrollment	View		Yes
Covered Dependent Information	View		Yes
Health, LTD and Life Benefits Coverage	View		Yes
Retirement Plan and Carrier Allocations	View		Yes
Tax Deferred Annuity (SRA) Contributions and Carrier Allocations	View		No
Payroll Summary			
Paycheck	Print		No
Direct Deposit	Edit		No
W4	Edit		No
Job Summary		View	Yes
PSYCHE Information		View	Yes
Interdisciplinary Affiliations		View	No
PAF and Nomination Form		Print	No
Turnaround PAF		Print	No

Demonstrations

- **People @ Columbia Manager Self-Service Demonstration**

- **Jobs @ Columbia Demonstration**

Other HR Topics

- **Attendance Tracking**
- **Organizational Charting**

Next Meeting

The next HR Management Committee meeting will be held **Friday, March 5th from 9:30 – 11:30 a.m..**

The following topics will be discussed:

- **People @ Columbia – Project Accomplishments**
- **People @ Columbia – Employee Self Service**
- **People @ Columbia Training Approach**
- **People @ Columbia Testing Approach**
- **Jobs @ Columbia Go-Live**

How to Obtain Information on the JAC Project

1. E-Mail comments and questions to pp2111@columbia.edu
2. View the Job Opportunities web site for project information (coming early Feb 2004): www.columbia.edu/cu/jobs/
3. Contact the JAC Project Manager, Paula Puhak
 - (212) 851-2835
 - pp2111@columbia.edu

How to Obtain Information on the PAC Project

1. E-Mail comments and questions to PAC@columbia.edu
2. View the Project Website for project information:
www.columbia.edu/cu/pac/
3. Contact the PAC Project Director or Communications Liaison
 - **Project Director: Lynne Gere**
 - (212) 851-2912
 - lg2193@columbia.edu
 - **Communications Liaison: Joseph Harney**
 - (212) 854-1540
 - jh2087@columbia.edu