



**Columbia University
PeopleSoft PAC Project
Service Managers and
HR Administrators'
Meeting**

December 10, 2003



What is the PeopleSoft PAC Project?

- **PeopleSoft is an ERP (Enterprise Resource Planning) Software Vendor which provides full integrated organizational enterprise software solutions for strategic and administrative functions**
 - ❖ **Columbia University is implementing the Human Resource suite of administrative functional solutions**
 - **Human Resources**
 - **Benefits**
 - **Benefits Administration (future)**
 - **Payroll**
 - **Time & Labor (future)**
- **This PeopleSoft PAC Project is the continuation of the same project following re-evaluation since 2002.**
- **The PeopleSoft PAC Project represents the replacement of disparate, non-integrated legacy HR systems into one common fully integrated enterprise platform for Human Capital information**
- **The PeopleSoft PAC Project helps meet the objective of the the “Envision 2000: Columbia Payroll and Human Resources Redesign” effort**



People @ Columbia Project Phases

Phase I (September 2003 to October 2004)	Phase II (To Be Determined)
<ul style="list-style-type: none">• Standardized, Common, Integrated HRMS Data/Information• Human Resources (Hire to Retire)• Regulatory Reporting• Employee Self Service/ Inquiry by Managers• Faculty Tracking• HSD FAHRIS 2-way link• Benefit Plans for Employees• Payroll• Quarterly and Annual Payroll Reporting• Payroll Self Service (Direct Deposit, Paycheck, W-4 changes)	<ul style="list-style-type: none">• Benefits Administration to Providers• Benefits Self-Service for New Hire, Open Enrollment and Maintenance• Time and Labor• Managerial Self Service for Employee Maintenance (in Departments/Schools)• HR Interface to HSD FAHRIS for Health Sciences informational enrichment• Workflow Approvals
13 month- Phase I effort represents the replacement of several disparate legacy systems, and the development of the foundation upon which future HRMS processes and systems will be deployed	Phase II effort represents the building of additional HRMS process improvements and further integration across multiple sub-processes



What did we accomplish before?

Change Management

- Project Team received PeopleSoft “On-the-Job” training
- Management Committee and Senior HR Management team in place

Design/Development

- Most system and process design decisions made
- Significant design, configuration and development work completed

Technical

- Technical architecture & infrastructure largely in place

Conversion

- Configuration data validated during parallel test
- Full target employee population validated during prior parallel test

Parallel Test

- Knowledge of discrepancies to leverage for future testing and reconciliation
- Reusable reconciliation scripts
- Configuration updated and fixed as a result of parallel testing



Where are we now for Phase 1?

Management

- Assessed remaining effort, and developed detail work plan
- Identified, Obtained, and Secured Project Resources & Requirements
 - Staff
 - Hardware
 - Software
 - Physical Space at 330 Fifth Avenue
- Redefined Project Team & Structure
- Established Management Committee of Project Sponsors
- Established HR Management Committee of Project Advisors
- Communicated to HR Management Committee on monthly basis
- Resurrected Project as of September 4th

Technical

- Completed technical upgrade to PeopleSoft's latest Release 8.8 in 10/03

Functional

- Validated Process Design and Configuration in 9/03-10/03
- Designing outstanding Configuration and Technical Components 10/03- 1/04



Benefits of PeopleSoft PAC Phase I

- 1. PIS, BIS and GEAC are combined in to a single source, University HRMS (Human Resource, Benefits and Payroll) system.**
 - Data entered once
 - Fewer hand-offs
 - All HRMS sources share the same data
- 2. Department Administrators enabled with direct access to the University HRMS system.**
 - View their employees' personal and employment data
 - Update employee demographical data directly into the system
 - Ability to create PAFs
- 3. Employees have the ability to update and/or view Human Resources, Payroll and Benefits data via the web.**
 - Update address, phone numbers, directory approvals and emergency contact data
 - Enter tax elections and direct deposit information
 - View and print paycheck information
 - View benefits enrollment information
- 4. Position Management utilized for Administrative and Academic positions.**
 - Administrative Staff - allows for unique position numbers for each job, providing knowledge of vacant and filled positions and position history
 - Academic Staff - provides ease of data entry
- 5. Use of Job Classifications and Job Families to aid in comparative studies for the Administrative Offices.**
 - University Rank Code structure replicated in PeopleSoft allowing continued precise differentiation of academic and administrative staff.
 - Classification of Administrative staff into job families enhances the ability to complete comparative studies while enabling Human Resources staff to better develop career paths at Columbia.



Benefits of PeopleSoft PAC Phase I

Current System	PeopleSoft System
Data needs to be entered in both the HR and the payroll system, which can lead to differences in data between the systems and inaccurate paychecks	Data will be in one system, which improves data integrity leading to more accurate paychecks.
Benefit deductions are only fed to the payroll system once a month. This leads to missing or inappropriate benefit deductions on paychecks and extra time spent processing retro benefits.	Benefit deductions are in the same system as HR and payroll. Benefit deductions will be timely and accurate on the paychecks and fewer retro benefits will be necessary.
Department Administrators can only update data in the HR system by entering changes on the PAF form. Sometimes, it takes multiple weeks for the PAF form to cycle back to the DAs, which leads to long delays in updating employee's data in the HR system.	Department Administrators will be able to print PAF forms directly from the system, which will lead to faster turnaround on updating employee's data since they don't have to wait for the PAF to cycle back.
Department Administrators have to contact both the payroll and HR departments to see if data is entered in the system	Department Administrators will have direct access to a single source of entry for the University HRMS system. They will be able to view personal and employment data for their employees.
Employees are required to fill out a form to update direct deposit and tax information. Updates to the system may take numerous weeks.	Employees will be able to directly enter tax elections and direct deposit information in to the system making these updates immediate.
Paychecks are hard to decipher as some earnings and deductions are combined in to a single line.	Clearer earnings and deductions descriptions and better segmentation of paycheck items, such as pre and post tax deductions and employer-paid benefits, will make it easier to understand the paycheck.



Phase I Timeline for 2003 - 2004



Technical Upgrade
*Upgrade Tech Environment to Current PS Version

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

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

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

Training
July - September
*End users of the PeopleSoft HRMS system will participate in classroom style training, including exercises. The number of classes necessary for each user to attend will be based on the users future role.

End User Assurance
August - September
*End users will participate in an activity that simulates their daily work effort in PeopleSoft. This simulation will allow users to self-assess their ability and practice using the new PeopleSoft HRMS system to complete their daily activities, as well as provide some final system feedback.





How to Obtain Information on the PeopleSoft 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 Project Director or Communications Liaison

Project Director: Lynne Gere

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Communications Liaison: Joseph Harney

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