Preparing for PeopleSoft Go-Live

March 2014
Agenda

• Get Ready for Go-Live!
• Implementation in Sequences
• Training Plan
• Cutover Plan
• Getting Help
• PeopleSoft: Our Future
Get Ready For Go-Live!
PeopleSoft Goes Live
What’s Happening at Go-Live?

• HR and finance business transactions will be entered in PeopleSoft.
  – Administrative support staff will have limited access to enter transactions directly in PeopleSoft.

• Interim processes will be used to collect approvals for specific HR and finance transactions.

• Employees will have access to Employee Self-Service
  – View/update personal data, setup multiple direct deposit accounts, view paystub information, etc.
  – Open lab sessions will be set up in the library the second week of May to encourage employees to review/update their information.
What is Sequencing?

• Allows for functionality to be delivered in phases in order to stabilize the system before widespread campus access is granted.
• Allows for more efficient problem resolution of system errors that may occur with minimal disruption to campus community.
• Reduces initial training requirement.
Sequence Plan

May 2014 Go-Live

- Core HR & Finance Functionality
- View/Update Personal Data
- View Work Schedule
- View Paystubs
- Setup Direct Deposit

Sequence 1

PeopleSoft Approval Routing (Workflow) Functionality
- Recruiting & HR Transactions
- Position Funding Changes
- Additional Pay/Supplements
- Budget Transfers
- Travel & Expense Transactions
- Vendor Payments

Sequence 2

All PeopleSoft Approval Routing Functionality in Place
Employees can submit timesheets & leave requests through PeopleSoft.
Transactions Entered in PeopleSoft

- **By the Department** (i.e., Library, Athletics, Colleges, etc.)
  - Timesheets & Leave Requests
  - Travel Authorizations
  - Travel Reimbursements
  - Expense Reimbursements
  - Vendor Payments
  - Budget Transfers*

- **By the Processing Units** (i.e., Payroll Office, Budget Office, HR, etc.)
  - Create/Update Positions
  - Job Postings
  - Hire Employees
  - Position Funding Changes
  - Supplements

*Budget Transfers involving grants accounts entered by Contracts & Grants.
Collecting Approvals for Transactions

- Automated routing (workflow) in PeopleSoft will not be enabled at go-live. Temporary workarounds will be put into place.

- Interim approval routing processes will be used to collect and route data for approvals and processing.
  - Notifications to approve transactions will be sent through email.

- Interim approval routing processes will ensure that approvals are in place before a transaction is processed in PeopleSoft.
Example: Interim Approval Process

Outside PeopleSoft

• Department submits electronic Travel Authorization Form
• Account owner reviews & approves electronic document

Inside PeopleSoft

• Department enters travel authorization information into PeopleSoft
• PeopleSoft budget checks for funds & auto approves
Training Plan
About Training

• Training starts mid-March.
• Includes formal and informal training:
  – **Formal:**
    • Instructor-led hands-on sessions using simulations of common transactions.
    • Employees selected based on their roles.
    • List of training attendees vetted through their supervisors.
  – **Informal:**
    • Lectures, PowerPoints, quick guides, UPKs

[Click here to view the PeopleSoft Training webpage]
UPKs (User Productivity Kit)

• UPK is a PeopleSoft simulation tool used for training.
• Three different modes:
  – *See It!*: Runs a video simulation of a business process.
  – *Try It!*: Guides the user to interact with the video simulation by completing prompts.
  – *Print It!*: Print step-by-step instructions on how to complete a business process.
• UPKs will be available online to allow department to continue practicing from their desk.

[Click here to view UPKSs](#)
Course Training Registration

• Employees identified as requiring training will receive email notifications for the course(s) they must attend.
  – Employees must register for a timeslot for each of their required course(s).
  – Notifications are sent out 2 weeks before the first session.

• Training is required in order to get access to process transactions in PeopleSoft.

• If you do not receive an email invitation to attend training and believe you have been overlooked, email peoplesoft@utep.edu.
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<td>Vendor Payments Time Reporting</td>
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Cutover Plan
What is Cutover?

• Cutover refers to processing deadlines or transactions that must be halted by a certain date in Define/HRMS.
• Modeled after the current process for handling year-end processing deadlines.
• Cutover is required in order to prepare data for transfer into PeopleSoft.
• There are cutover activities for Grants, Finance, HR, and Purchasing.
• Cutover Forums will be held in mid-March.

[Click here to view cutover deadlines]
Getting Help
Drop-In Help Sessions

• Employees can drop in to process their HR & Finance documents in the PeopleSoft lab.
• Sessions will be held in the lab for the first month after go-live. See calendar for specific dates/times.
• A subject matter expert from our central processing units (i.e., Payroll, Budget, HR, Travel) will be present to offer assistance.
• Process documents with your peers.
• Get practice and take what you learned back to your home offices.
• Location: PeopleSoft Lab Prospect Hall 300; 49 available computers
Help Desk Support

• After go-live, submit any PeopleSoft questions/issues to the Help Desk.
• By tracking issues through the Help Desk, we can:
  – Respond to your question/issue in a timely manner.
  – Escalate issues as needed.
  – Review trends and proactively address systemic problems.
  – Identify common questions in order to adjust training material.
• We strongly discourage direct contact to central processing unit’s personnel for PeopleSoft-related inquiries.
PeopleSoft: Our Future
Our Future With PeopleSoft

• Future functionality:
  – Approval routing (workflow) in PeopleSoft.
    • Electronic processing of documents by the department.
  – Employee submission of timesheets in PeopleSoft.
  – Recruiting module enhancements.
  – Reporting functionality enhancements.
  – Document imaging capabilities.
    • Eliminates the need of paper approval routing.
Starting with PeopleSoft

• There’s only one place to start:
  With You.

• While the system is intuitive, as with all new software, there is a learning curve.

• We are committed to supporting your efforts.

We are all responsible for the success of PeopleSoft implementation.
Resources

• A copy of this presentation is posted on peoplesoft.utep.edu.

• Questions regarding training can be directed to the Help Desk:
  – On-Campus: 747-HELP (4357)
  – Off-Campus: 747-5257

• All other questions can be directed to peoplesoft@utep.edu
Questions?

Answers to questions asked during today’s forum will be posted on the PeopleSoft website within 3 days.