HR / Payroll Data Migration
Aligning and Integrating Payroll Systems at Rutgers

Vivian Fernández, Senior Vice President for Human Resources
and Organizational Effectiveness

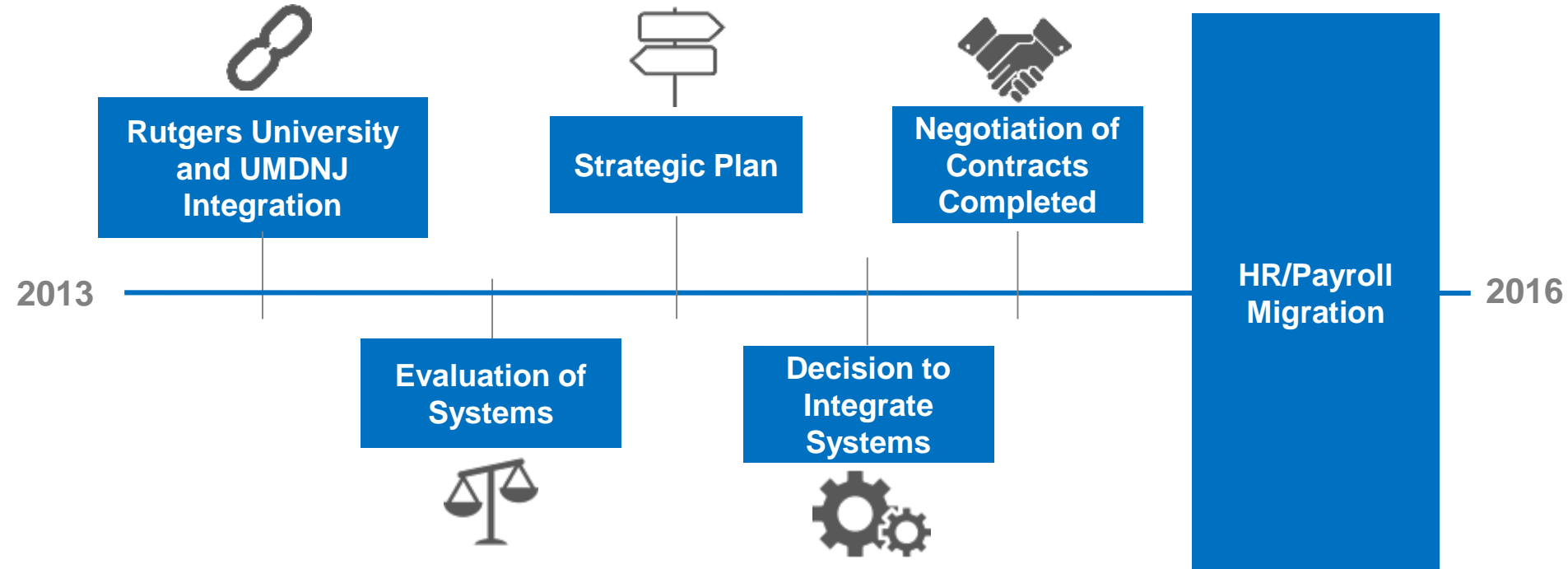Stephen J. DiPaolo, Financial Project Champion

Cornerstone
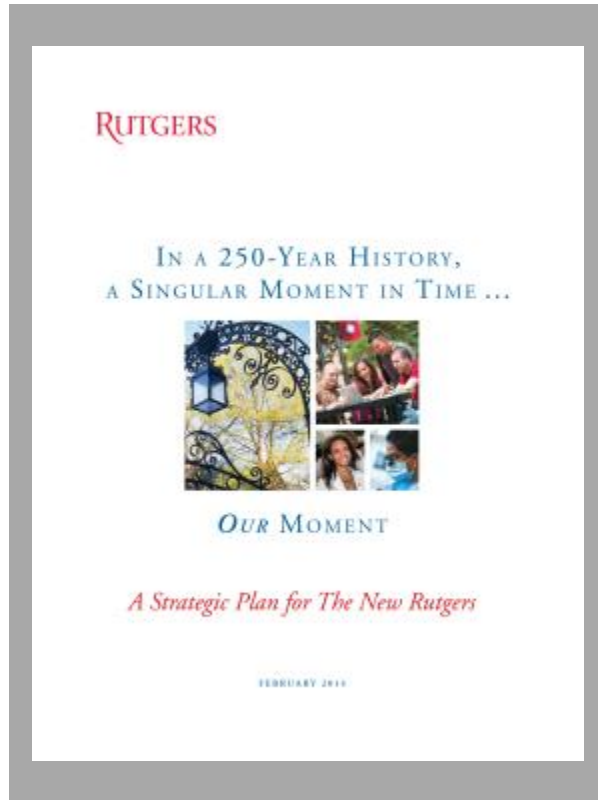*Transforming the Way We Work at Rutgers*

Welcome!

Background

Timeline 2013 – 2016:

- Rutgers University and UMDNJ Integration
- Evaluation of Systems
- Strategic Plan
- Decision to Integrate Systems
- Negotiation of Contracts Completed
- HR/Payroll Migration

University Strategic Plan
Guidance for Administrative Systems Transformation

"*Provide **best-practice academic and administrative systems** and organizations, backed by updated technology.*"

Source: *A Strategic Plan for the New Rutgers*, 2014

What is Cornerstone?

- Administrative Information Systems (AIS) transformation at Rutgers, which consists of:

  – HR / Payroll Data Migration (PeopleSoft)

  – Budget Planning and Forecasting (Hyperion)

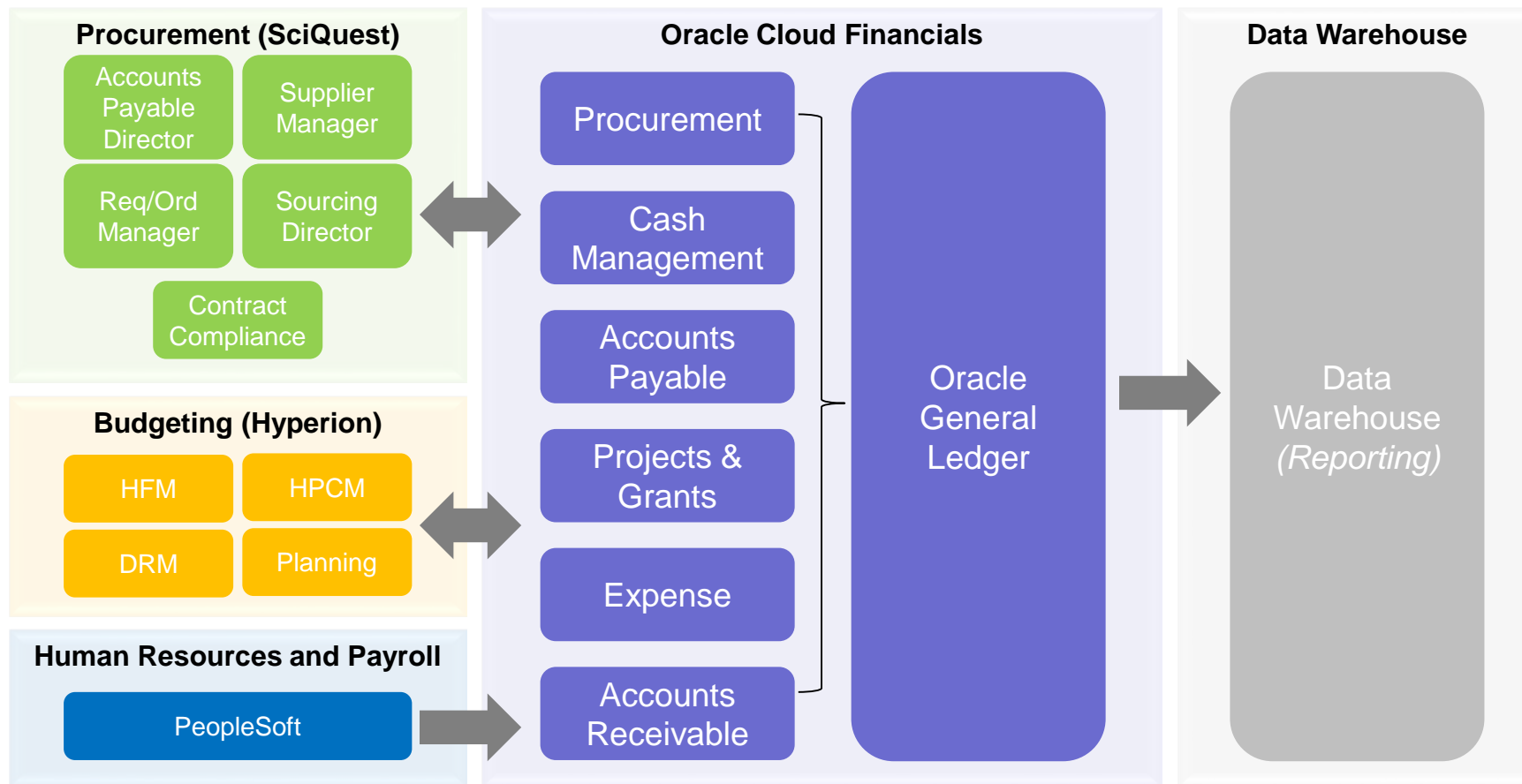 – Financial Management (Oracle Cloud)

  – Procurement and Expense Management (SciQuest)
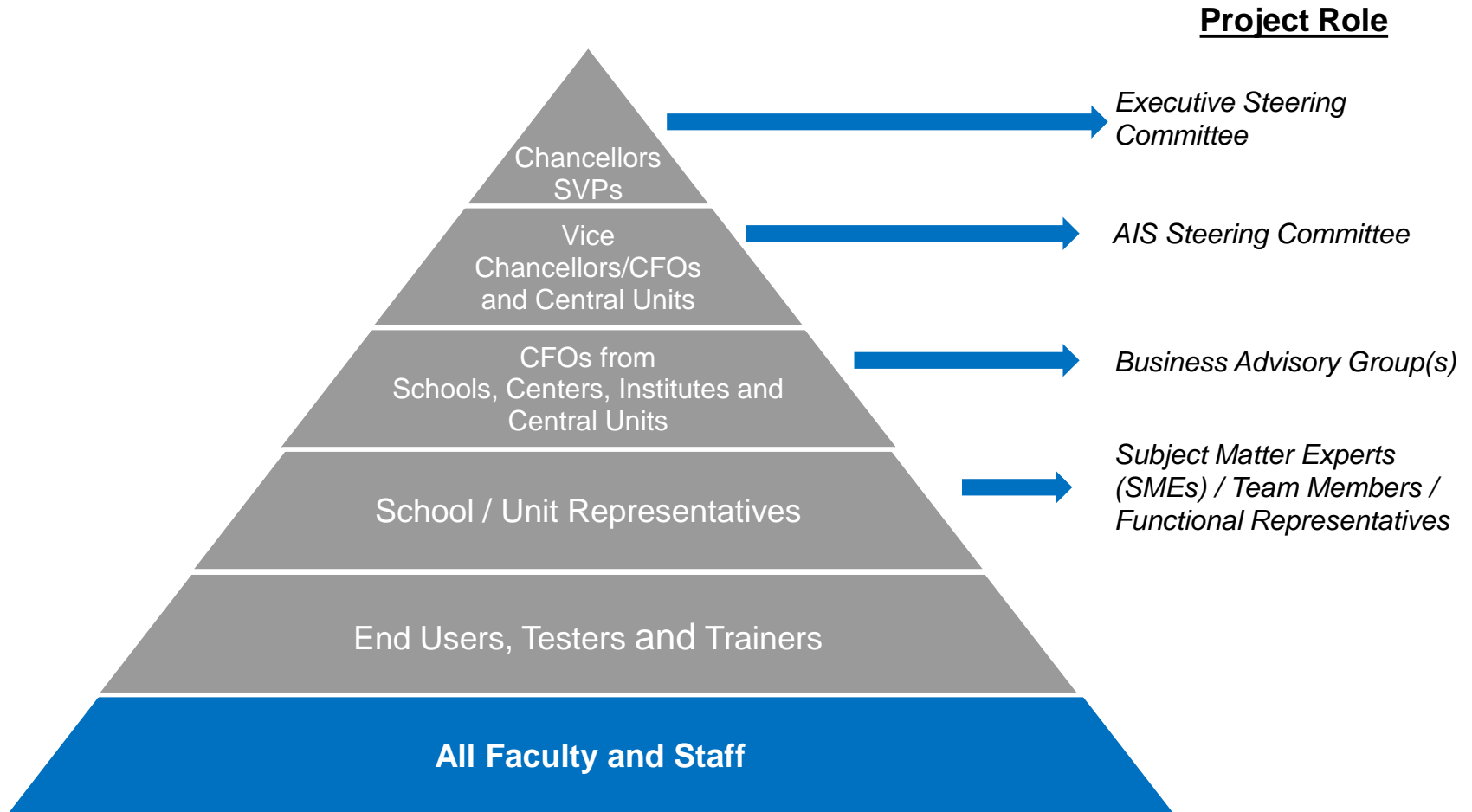
"Transforming the Way We Work at Rutgers"

Administrative Information Systems
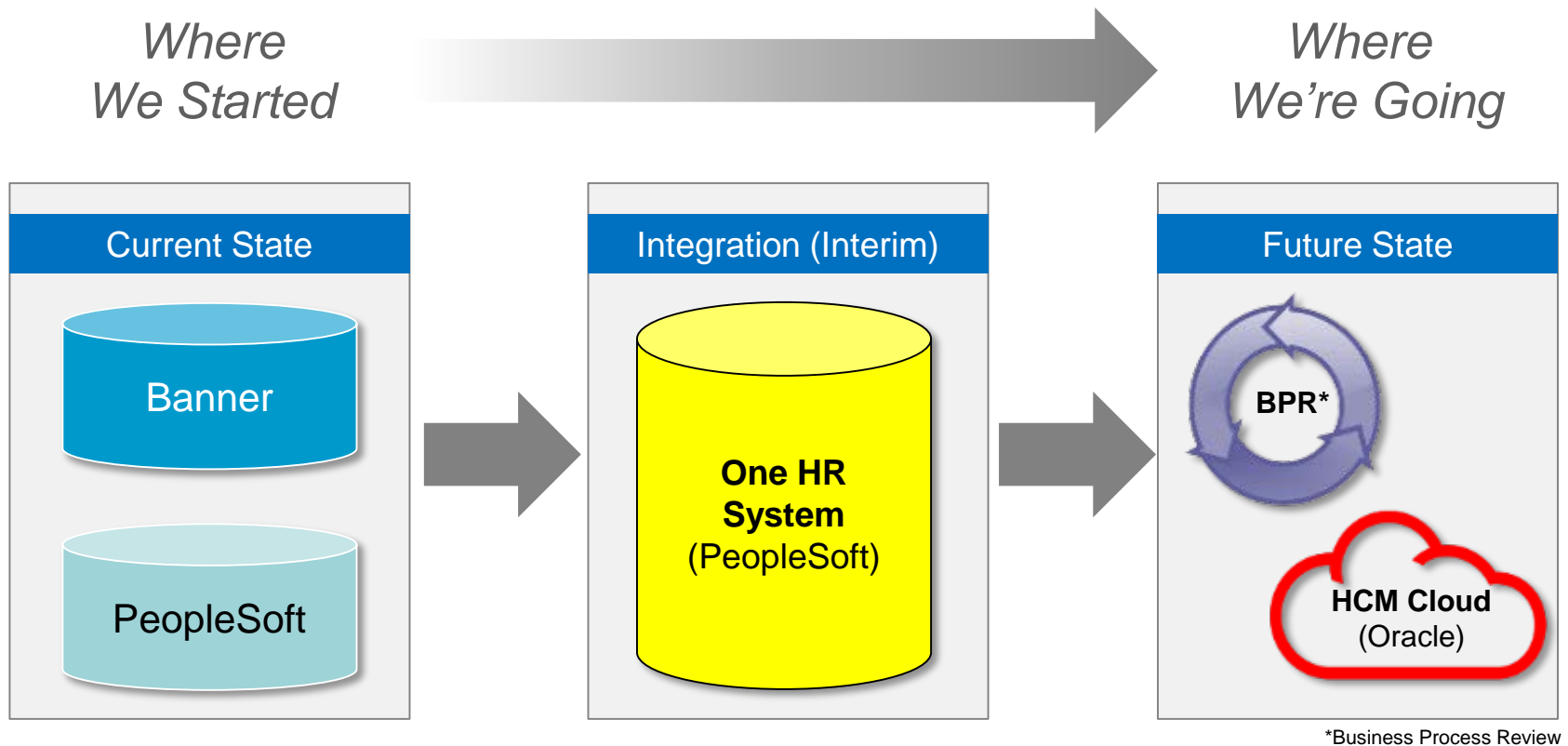*Financial, Procurement and Human Resources and Payroll Environment*

NOTE: HFM (Hyperion Financial Management), HPCM (Hyperion Profitability and Cost Management), DRM (Data Relationship Management), Planning (Hyperion Planning)

HR/Payroll Migration Roadmap

Where We Started → *Where We're Going*

Current State	Integration (Interim)	Future State
Banner	**One HR System** (PeopleSoft)	**BPR***
PeopleSoft		**HCM Cloud** (Oracle)

*Business Process Review

Benefits of Migration - *Business Perspective*

1 University-Wide Integrated Processes	**2** Business Process Efficiency
3 Moving Away from Paper Timesheets	**4** Electronic Workflow for Time Entry & Approval
5 Consolidated Reporting	**6** Streamlined Human Resources Transactions

Benefits of Migration - *Employee Perspective*

Unified Functions and Resources

✓ Consolidated Payroll Processes
✓ Eliminated Paper Timesheets
✓ Aligned Employee Self-Service Experience
✓ Simplified Processes for Multiple Assignments

Benefits of Migration - *Employee Perspective*

Consolidated Payroll Processes

- ✓ One Database System for Payroll Reporting
- ✓ Employees will have a Shared Experience

Benefits of Migration - *Employee Perspective*

Eliminated Paper Timesheets

- ✓ Payroll Processed Electronically
- ✓ No Paper Records

Benefits of Migration - *Employee Perspective*

Aligned Employee Self-Service Experiences

- ✓ Absence Reporting is Electronic
  - ➤ Manual Process is Eliminated
- ✓ Access to Real-Time Absence Reporting Information
  - ➤ Paid-Time-Off Accruals Automatically Calculated
  - ➤ Rules Provide Automatically Populated Paid-Time-Off
- ✓ Online Updating of W4 Forms

Benefits of Migration - *Employee Perspective*

Simplified Processes for Multiple Assignments

- ✓ Consistent Second and Third Assignments Processes
- ✓ History of Past and Present Assignments

Business Process Changes
Staff and Faculty HR Transactions

What's Changing?

- HR transaction forms used by Banner Units will align with PeopleSoft requirements

- Electronic Personnel Action Form (EPAF) will be eliminated – Streamlined Process

- Salary (labor) distributions will be handled by the unit's designated commitment accounting staff

HR Transaction Processing

Paper-Based Transactions to Transition Banner Units to PeopleSoft

Business Units
- Business Unit Originator
- Business Unit Approver
- Budget Approver

Central HR
- Human Resources Preparer
- Human Resources Approver
- Human Capital Management/ Academic Labor Relations

Business Units
- Budget Approver

16
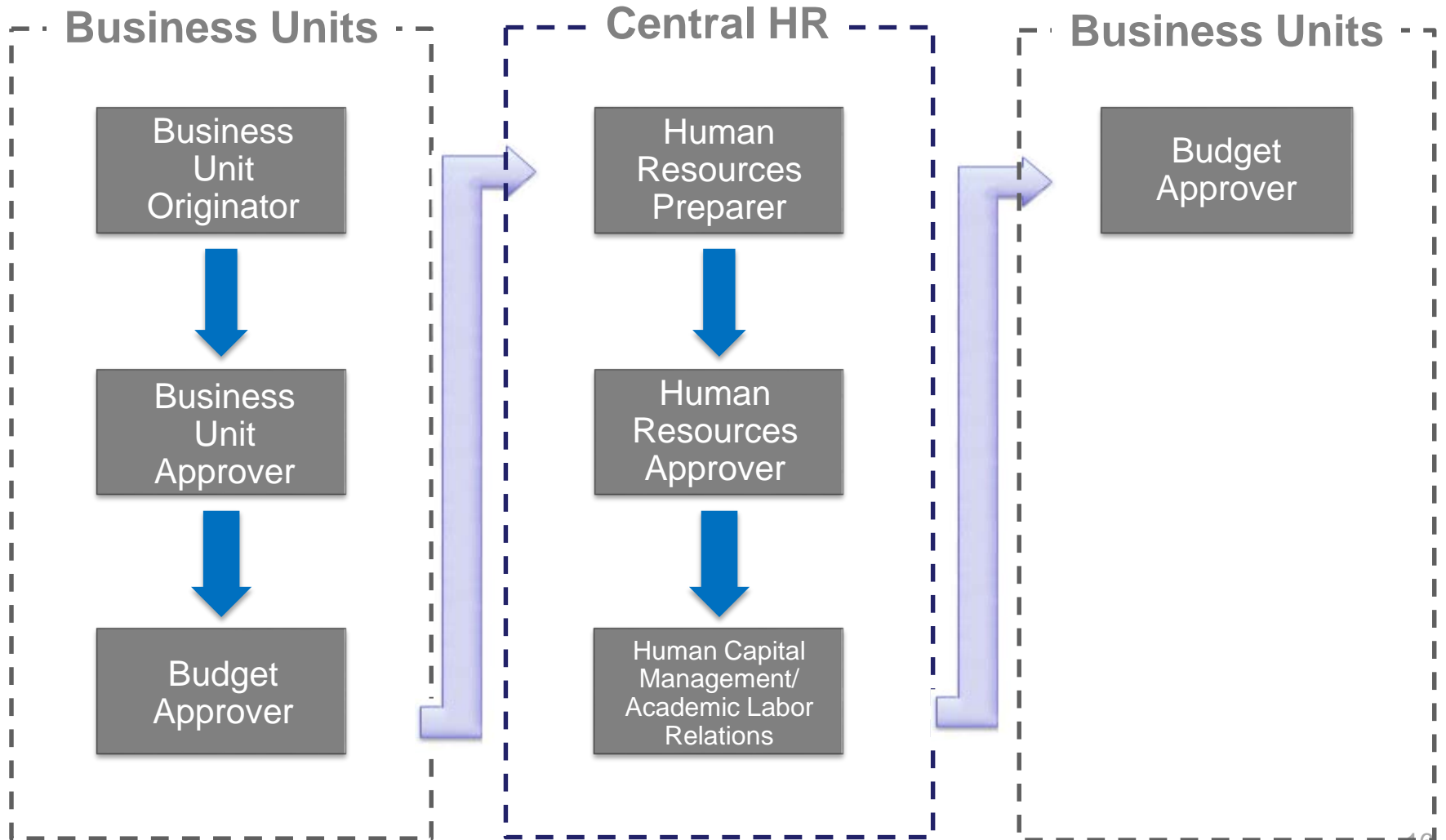
Business Process Changes
Commitment Accounting

What's Changing?

- Salary (labor) distributions will be entered into PeopleSoft

- Each department will identify a default account to set automatic charging instructions for new employees

- Business administrators will update Employee Charging Instructions (ECI) only if different from the department default account

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Commitment Accounting Process Responsibilities

Employee Transactions that Impact a Department's Budget

Changes to Salary Allocations

Salary Transfer

Salary Reallocation

Commitment Accounting Preparer

Commitment Accounting Approver

Payroll Services
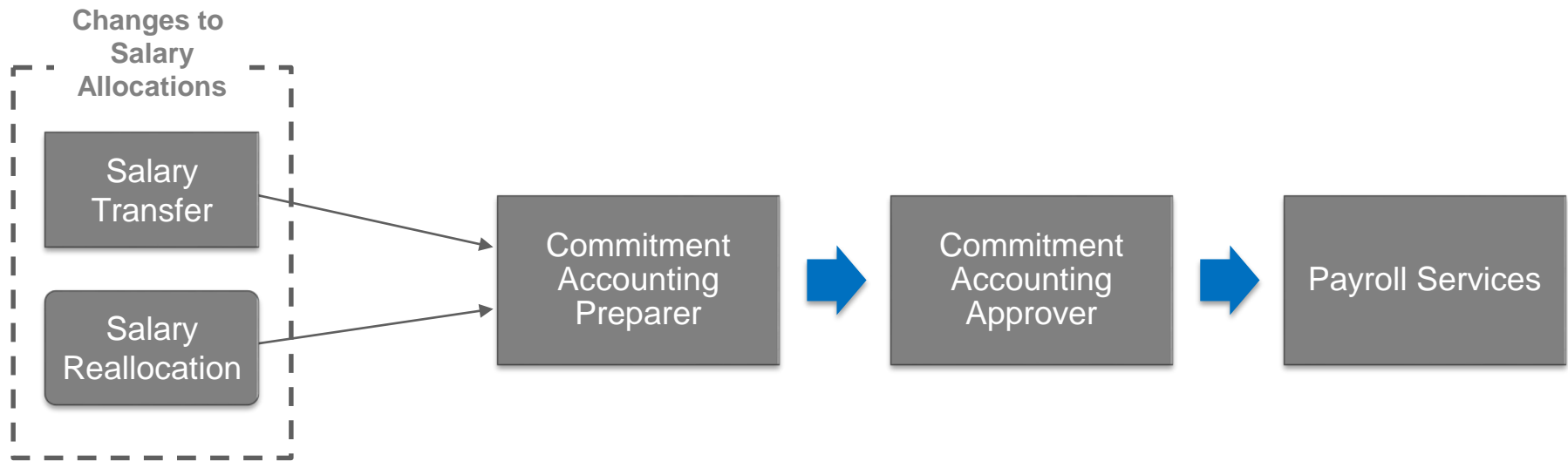
Business Process Changes
Time Entry & Approval

What's Changing?

- Payable time will be entered, routed and approved electronically, rather than on paper

- Paid time off will be tracked through an electronic Absence Reporting tool in PeopleSoft, rather than on timesheets

Time Entry & Approval Process Responsibilities

Non-Exempt Hourly Employees – *Report all time worked*
Non-Exempt Salaried Employees – *Report Additional Hours Beyond Standard Work Week*
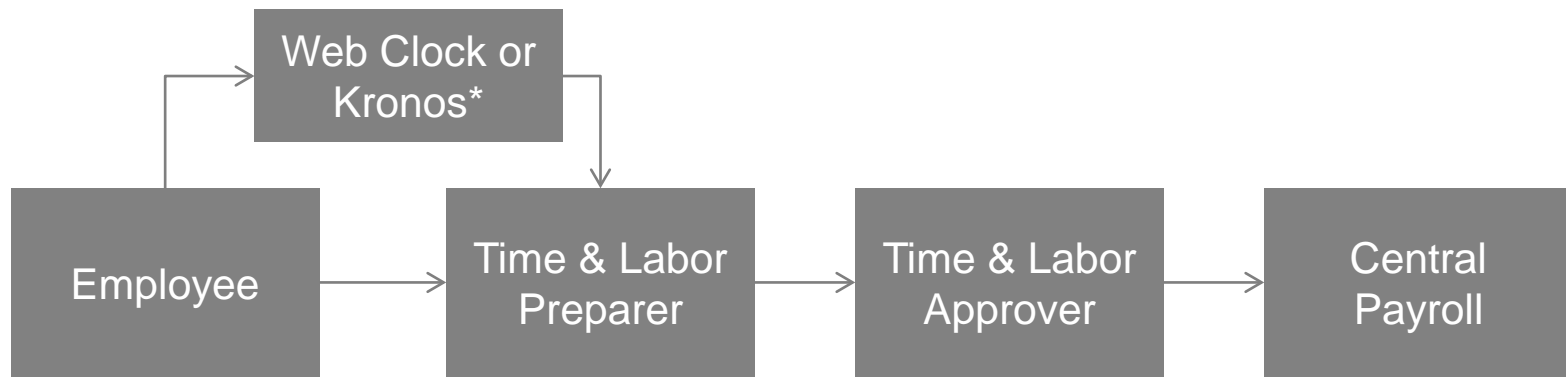
*Kronos is only being used by specific departments
(i.e. Facilities, Dining, Public Safety)*

Absence Reporting Process Responsibilities

All Staff Employees Who Are Eligible for Paid Time Off
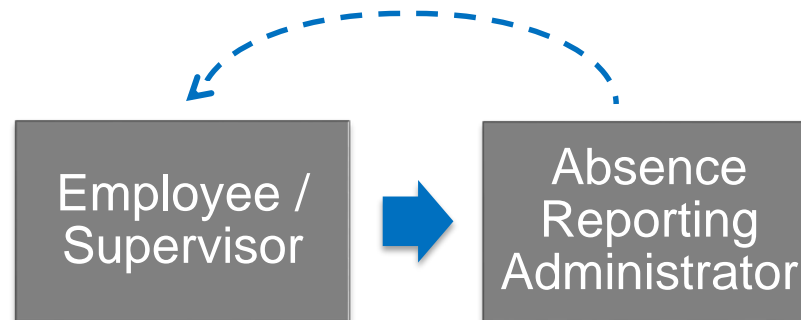
RUTGERS

Login using your NetID. You will be logged out automatically after 30 minutes of inactivity.

LOGIN

Resources | Welcome

System Announcements

There are no announcements at this time.

University Messages

Attention UCHC Staff

Your email will be migrated to Microsoft

Please check your current email Inbox fo

If you have not yet received an email fro
Brunswick Helpdesk at 848-445-4357. Th

New Brunswick Undergraduate Students: Get Vaccinated Against Meningitis B   7-7-2016

- Serogroup B meningococcal disease, sometimes referred to as "meningitis B", can be deadly within hours or days of getting sick. It can also lead to severe disabilities, such as loss of limbs.
- Based upon lab testing, the best protection against the specific outbreak strain is expected with the full 3-dose series of the meningitis B vaccine Trumenba®.
- Action Required: Verification of each meningitis B vaccine dose received or declination is required prior to arriving for the Fall 2016 semester.

For more information, including where to get vaccinated, visit health.rutgers.edu/meningitis.

1766-2016
RUTGERS
250

Join the conversation with #Rutgers250.

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Tab to Access Employee Self Service

Employee Self Service

RU Email   Feedback   Help   Logout   People   RU Search

Welcome ... ay

Google

To acce

(ScarletApps)
Get 7GB of storage, protect against spam and viruses, stay connected with built-in IMAP and POP message access, and more.
Help on how to use Mail

ScarletCalendar
Share calendars and schedule people, groups, rooms and resources easily, even from your mobile device.
Help on how to use Calendar

ScarletDocs
Create and share a variety of online documents, from word processing and spreadsheets to forms and presentations -- all with mobile access.
Help on how to use Docs

ScarletApps Homepage | Frequently Asked Questions | Training Resources

RU Email

Log into the RCI Webmail Service   Setup Forward

Inbox (3099 unread)   Check Mail   Compose   Folders   Addresses   Spam Filters

Up-to 10 latest messages from RCI (Last checked at 07:50:49)

Sender	Subject	Date
Edward Nygma	Riddle me this, Riddle me that	07/19/2016 08:01 AM
Oswald Cobblepot	Wah wah wahhhhh!	07/18/2016 08:00 AM
Selina Kyle	Purrr-fect Plans for Saturday Night	07/17/2016 08:01 AM
The Joker	ha ... hahahaHaHaHAHAHAHA!	07/16/2016 08:01 AM
Dick Grayson	About the costume...	07/15/2016 08:00 AM

Technology   News   Scarlet Knights   Add Tab

Add Content   Skins   More Options

Today

RUTGERS TODAY

Youngest Summer Scholar Ever Finds a Perfect Fit at Rutgers
Meet Ennyn Chiu, age 9, and her 11-year-old sister Enna. They are studying green-fluorescent protein, Förster resonance energy transfer and other scientific concepts in the Rutgers Summer Scholars Program. Of the 145 students in the program, the majority are high school juniors and

Featured Events

Featured Events   More Events: New Brunswick/Piscataway, Newark, Camden

Road to Wall Street Boot Camp
Fri 2 / 12 / 2016 @ 3:00 PM - Mon 2 / 12 / 2018 @ 5:00 PM
Gateway Transit Village
4th Fl. (next to Barnes & Noble on CAC)
New Brunswick

Exhibit: The Elusiveness of Progress: Voting Rights in America
Tue 3 / 1 / 2016 @ 09:00 AM - Wed 8 / 31 / 2016 @ 5:00 PM
Kilmer Library

Employee Self Service Functions

Users can access the following information in their employee file and request changes if needed:

1. **Personal Information**: Can edit contact information; emergency contacts, home address, telephone number(s), demographic info

2. **Payroll and Compensation Information**: can edit direct deposit, W-4 deductions, can view W-2 form, withholdings, etc.

3. **Benefit Information**: can view current benefit elections, absence balances, etc.

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What is Web Clock?

Tracks employee time in and time out, and allows employees to view personal time cards online. Timekeepers can also add and/or adjust time on the timesheet.

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Transforming the Way We Work at Rutgers

Favorites | Main Menu > Self Service > Time Reporting

Navigation Page ×

Home | Add to Favorites | Sign out

Main Menu

Time Reporting

Report and review your time, schedules, request absences and more.

Report Time
Report your time and request planned overtime and absences.
- Overtime Requests
- Web Clock

...edules, forecasted, payable and comp time, exceptions and more.
...tory Time
...ime Summary
...ime Detail

RUTGERS

Favorites | Main Menu > Self Service > Time Reporting > Report Time > Web Clock

Home | Add to Favorites | Sign out

New Window | Help | Customize Page | http

Web Clock

Enter Punch

Bruce Wayne

Job Title: Dark Knight Detect

Enter Punch
Enter Punch Type, relevant time

*Punch Type:

Time Zone:

Time Reporting Elements
Day:
Taskgroup:
Override Reason Code:
Time Reporting Code:

Comments:

Task Reporting Elements
Combination Code:

ChartFields

Go To: Self Service
Time Reporting

time and task information. Save with Enter Punch button.

In

| In |
| Meal |
| Out |

Enter Punch

Tuesday

PSNONCATSK   Commitment Accounting

Enter Punch

RUTGERS

RUTGERS

Favorites | Main Menu > Manager Self Service > Time Management > Approve Time and Exceptions > Payable Time

Approve Payable Time

Approve Time for Time Reporters

▼ Employee Selection Criteria

Employee Selection Criteria

Description	Value
Empl ID	
Empl Record	

Job Description	
Department	ZBT005
Supervisor ID	
Location Code	

[Clear Selection Criteria]   [Save Selection Criteria]   [Get Employees]

Start Date: [   ]   **End Date:** [   ]

ⓘ Select to view Instructions

Employees For Marie Matusiak   Customize | Find | View All | 🗗   First ◀ 1 of 1 ▶ Last

Select	Name	Employee ID	Empl Record	Job	Job Description	Total Payable Hours	Department	Workgroup	Location Code	Supervisor ID	Override Hrly Rate (Y/N)	Override ComboCode (Y/N)
☐	Bruce Wayne	00001939	0	41001	D. Knight Detect.	1.000000	10470	SALNE375	3751 317	00006184		

Select All   Deselect All

[Approve]

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RUTGERS

Project Status
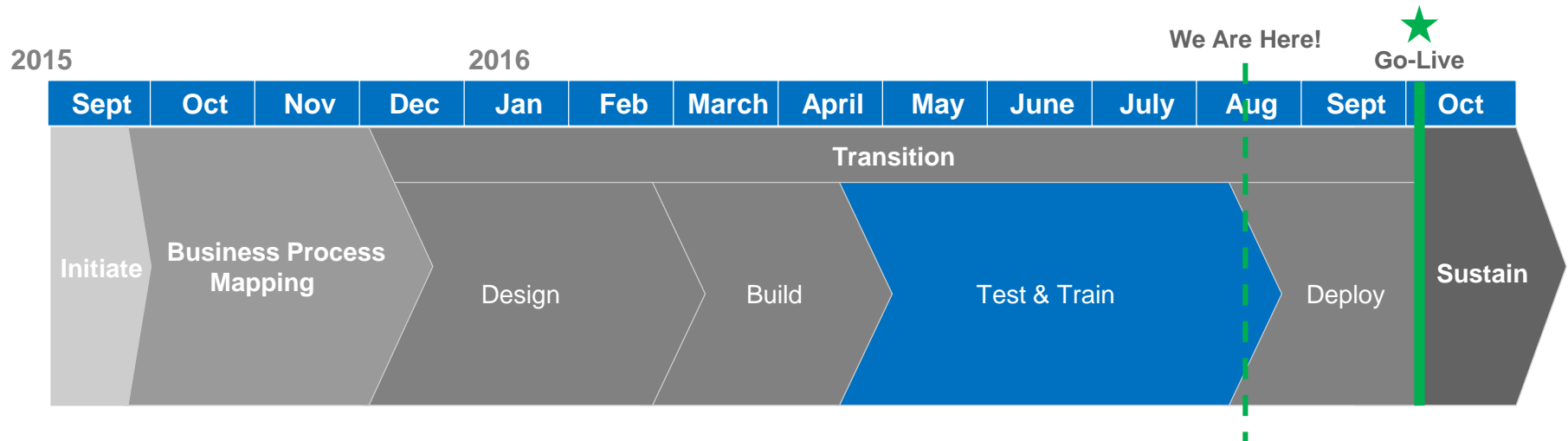
Testing Strategy

The HR/Payroll Banner Migration effort will be thoroughly tested using a phased sequence of activities that will drive toward the critical success factor of **Payroll Accuracy** after migration.

1

System Integration Testing 1

Executing testing to ensure start-to-end system functionality works correctly throughout specific processes for configurations and technical objects

Core Team

2

System Integration Testing 2

Execute testing to ensure start-to-end system functionality works correctly throughout specific processes for configurations and technical objects

Central HR

3

Payroll Parallel Testing

Verify that Payroll is calculated accurately given new configurations, enhancements and customizations by comparing Banner Payroll with test Payrolls processed in the merged system (PeopleSoft)

Core Team & Departments

4

User Acceptance Testing

Business scenarios are exercised to confirm end-users are able to perform their daily functions before going live

Select Dept. Administrators

Training for all testing participants

Course Pathway

Instructor Led	Web-Based/Job Aids

PS101: PeopleSoft Fundamentals: Bridging the Gap from Banner to PeopleSoft
Instructor-Led Training
Prerequisite
1 hour

TL020: Time Entry and Approval
Instructor-Led Training
2.5 hours

CA020: Commitment Accounting
Instructor-Led Training
2.5 hours

AR010: Absence System
Virtual Instructor-Led/Webinar
Video Job Aids
1 hour

WC010: Web Clock
Web-Based Training
20 minutes

ESS010: Employee Self-Service
Web-Based Training & Job Aids
20 minutes

KEY: | Instructor Led | Virtual Instructor Led | Web-Based |

Training Update

Business Unit Training

- ✓ Aug 8
- ✓ Aug 10
- ✓ Aug 15
- Aug 17
- Aug 22
- Aug 29
- Sept 8 (UCHC)

Additional dates in Sept. as needed

Other

- Office Hours

- Webex: Absence Reporting

- Web Tutorials: Web Clock, Employee Self Service

What to Expect Next

What kind of support will I receive after training?

THE BUDDY SYSTEM

KEEP CALM AND COME TO OFFICE HOURS

Office Hours & Open Work Sessions

Newsletter

Email Communications
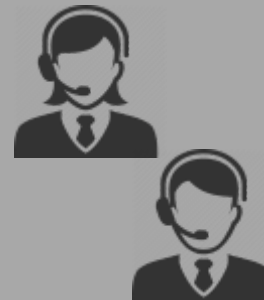- ✓ Post-Training Tips
- ✓ Cornerstone Newsletter
- ✓ Other Milestones, important news, etc.

Post Go-Live Support
- ✓ Help Desk
- ✓ War Room
- ✓ Video Tutorials
- ✓ Office Hours
- ✓ Training

Business Readiness – Cutoff Schedule

HCM Blog: http://hcmblog.rutgers.edu/index.php/2016/07/14/migration-countdown-has-begun

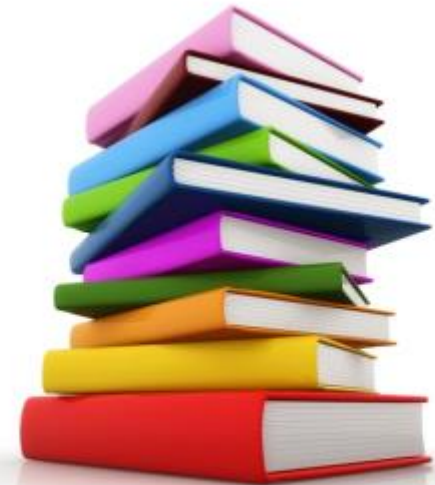| As of Date	System	Activity	Activity Date Cutoffs
9/1/2016	Banner & PeopleSoft		Accelerated Payrolls begin
9/14/2016	Banner		BANNER Centralized Personal Data Input Cutoff Date
9/14/2016	PeopleSoft		PeopleSoft Request Submission Cutoff Date
9/23/2016	Banner	Self-Service	BANNER Self-service Updates
9/30/2016	Banner	Self-Service	BANNER Self-service Review
10/1/2016	Banner & PeopleSoft		Both BANNER and PeopleSoft Systems will be Offline
10/8/2016	PeopleSoft		The PeopleSoft System will return to Online Status

How You Can Be Involved

- **Stay Connected**

  – Cornerstone Website

  – Roadshows

  – Newsletters

  – Treasurer's Town Hall

- **Send questions, suggestions and feedback to:** cornerstone@rutgers.edu

- **Reach out to a Business Advisory or School/ Unit Representative Group member**

  – Visit Cornerstone for contacts
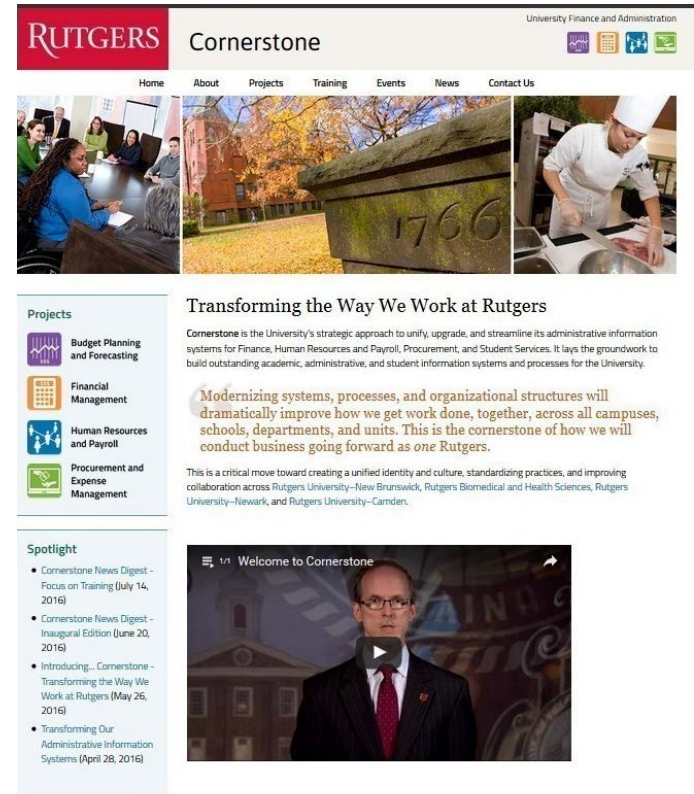
cornerstone.rutgers.edu

Additional Resources

- **RIAS Website and Learning Resources**
  - http://rias.rutgers.edu

- **My Rutgers Portal**
  - http://my.rutgers.edu

- **Rutgers Payroll Services Website**
  - http://payroll.rutgers.edu

- **Rutgers University Human Resources (UHR) Website**
  - http://uhr.rutgers.edu

- **UHR Website – HR Definitions**
  - http://uhr.rutgers.edu/glossary

- **HCM Blog Website**
  - http://hcmblog.rutgers.edu

- **Cornerstone Projects Website**
  - http://cornerstone.rutgers.edu

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If you have any questions or feedback, please send to
cornerstone@rutgers.edu