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

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Cornerstone
Transforming the Way We Work at Rutgers
Welcome!
Rutgers University and UMDNJ Integration

Evaluation of Systems

Strategic Plan

Decision to Integrate Systems

Negotiation of Contracts Completed

HR/Payroll Migration

2013

2016
“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)
Project Structure

- **Chancellors SVPs**
- **Vice Chancellors/CFOs and Central Units**
- **CFOs from Schools, Centers, Institutes and Central Units**
- **School / Unit Representatives**
- **End Users, Testers and Trainers**
- **All Faculty and Staff**

**Project Role**

- **Executive Steering Committee**
- **AIS Steering Committee**
- **Business Advisory Group(s)**
- **Subject Matter Experts (SMEs) / Team Members / Functional Representatives**
HR/Payroll Migration Roadmap

Where We Started

Current State

Banner
PeopleSoft

Integration (Interim)

One HR System (PeopleSoft)

Future State

BPR*

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
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
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

Employee / Supervisor  →  Absence Reporting Administrator
Login using your NetID. You will be logged out automatically after 30 minutes of inactivity.
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, tax-withholdings, etc.

3. **Benefit Information**: can view current benefit options, absence balances, etc.
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.
Please select the appropriate job from the list below

<table>
<thead>
<tr>
<th>Select Job Title</th>
<th>Empl Record</th>
<th>Department ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>CEO</td>
<td>0</td>
<td>ZWT027</td>
</tr>
<tr>
<td>DARK KNIGHT DET.</td>
<td>1</td>
<td>ZBT005</td>
</tr>
</tbody>
</table>

Go To: Self Service
       Time Reporting
The Save was successful

The following punch has been recorded:

- **Punch Type:** In
- **Date:** 07/26/2016
- **Day:** Tuesday
- **Punch Time:** 10:45:00AM
- **Time Zone:** EST

[OK]
### My Recent Paychecks

Review your last 5 available paychecks below. Select the date of the paycheck you would like to review.

<table>
<thead>
<tr>
<th>Check Date</th>
<th>Paycheck Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016-07-08</td>
<td>2738843</td>
</tr>
<tr>
<td>2016-06-24</td>
<td>2720018</td>
</tr>
<tr>
<td>2016-06-10</td>
<td>2701529</td>
</tr>
<tr>
<td>2016-05-27</td>
<td>933390</td>
</tr>
<tr>
<td>2016-05-26</td>
<td>933353</td>
</tr>
</tbody>
</table>

View Full Paycheck Self Service Page

### My Absence Balances

<table>
<thead>
<tr>
<th>Absence Type</th>
<th>Days Remaining as of Prior Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>26.50</td>
</tr>
<tr>
<td>Sick</td>
<td>178.75</td>
</tr>
<tr>
<td>Administrative Leave</td>
<td>1.00</td>
</tr>
<tr>
<td>Personal Holiday</td>
<td>2.00</td>
</tr>
<tr>
<td>Paid Leave Bank</td>
<td>4.00</td>
</tr>
</tbody>
</table>

View Absence Balances and Details Self Service Page
### Time Entry and Approval

#### Bruce Wayne

**Job Title:** Dark Knight Detective

**Employee ID:** 00001939

**Std Hourly Rate:** 10.000000 USD

#### Instructions

Report punch time with an actual time (ex. 8:15am) along with a punch type for each day (In, Break, Out etc.). You can have multiple punch times per day. An OUT punch is required at the end of each shift or workday.

Report elapsed time by specifying a TRC and entering the number of hours or units worked, or an amount in the Quantity field.

To report time for a different day, week, or time period, change the View By option or enter a new date in the Date field and select Refresh.

#### View By:

- **Week**

#### Date:

- **07/25/2016**

#### Reported Hours:

- **0.00**

#### Scheduled Hours:

- **0.00**

#### From 06/06/2016 to 06/12/2016

<table>
<thead>
<tr>
<th>Comments</th>
<th>Day</th>
<th>Date</th>
<th>Status</th>
<th>In</th>
<th>Meal</th>
<th>In</th>
<th>Out</th>
<th>Punch Total</th>
<th>Time Reporting Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mon</td>
<td>7/25</td>
<td>New</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tue</td>
<td>7/26</td>
<td>New</td>
<td><strong>08:30 AM</strong></td>
<td><strong>12:30 PM</strong></td>
<td><strong>01:30 PM</strong></td>
<td><strong>05:00 PM</strong></td>
<td></td>
<td><strong>HREG -- Hours Regular</strong></td>
</tr>
<tr>
<td></td>
<td>Wed</td>
<td>7/27</td>
<td>New</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Thu</td>
<td>7/28</td>
<td>New</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Fri</td>
<td>7/29</td>
<td>New</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sat</td>
<td>7/30</td>
<td>New</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sun</td>
<td>7/31</td>
<td>New</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Submit | Clear | Apply Schedule

---

**Cornerstone**

*Transforming the Way We Work at Rutgers*
time entry and approval

approve payable time

Bruce Wayne

Employee ID: 00001939

Job Title: Dark Knight Detective

Start Date: 
End Date: 

Select the time you wish to approve and then select the Approve button.

Select
Date
Time Reporting Code
Approval Monitor
Quantity
Type
Accounting Date
Adjust Reported Time
Comments

| 07/28/2016 | OVT | Approval Monitor | 1.00 Hours | 

Select All
Deselect All

Approve
RUTGERS

Time Entry and Approval

Approve Payable Time

Bruce Wayne

Job Title: Dark Knight Detective

Employee ID: 00001939
Empl Record: 0
Std Hourly Rate: 25.783475 USD

Select the time you wish to approve and then select the Approve button.
Enter a specific Accounting Date for each row of payable time to be published.
If you wish to use the current date as the publish date, you may leave the Accounting Date field blank.

Start Date:       End Date:       

Approval Details

Select Date Time Reporting Code Approval Monitor Quantity Type Accounting Date Adjust Report

09/09/2016 OVT Approval Monitor 1.00 Hours

Message

Are you sure you want to approve the time selected? (13504,2500)

Once Approved the status cannot be reverted back.
Select Yes to confirm and complete the status change, No to return to the page without updating the status.

Yes No

Return to Approval Summary

Cornerstone
Transforming the Way We Work at Rutgers
Project Status

Initiate

Business Process Mapping

Design

Build

Test & Train

Deploy

Transition

Sustain

We Are Here!

Go-Live

Sept | Oct | Nov | Dec | Jan | Feb | March | April | May | June | July | Aug | Sept | Oct

2015 | 2016

Initiate | Business Process Mapping | Design | Build | Test & Train | Deploy | Transition | Sustain

We Are Here!

Go-Live
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

<table>
<thead>
<tr>
<th>Instructor Led</th>
<th>Web-Based/Job Aids</th>
</tr>
</thead>
</table>
| **PS101: PeopleSoft Fundamentals:** Bridging the Gap from Banner to PeopleSoft  
Instructor-Led Training  
Prerequisite 1 hour | **AR010: Absence System**  
Virtual Instructor-Led/Webinar  
Video Job Aids  
1 hour |
| **TL020: Time Entry and Approval**  
Instructor-Led Training  
2.5 hours | **WC010: Web Clock**  
Web-Based Training  
20 minutes |
| **CA020: Commitment Accounting**  
Instructor-Led Training  
2.5 hours | **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?

- **Office Hours & Open Work Sessions**
- **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](http://hcmblog.rutgers.edu/index.php/2016/07/14/migration-countdown-has-begun)

<table>
<thead>
<tr>
<th>As of Date</th>
<th>System</th>
<th>Activity</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/1/2016</td>
<td>Banner &amp; PeopleSoft</td>
<td>Accelerated Payrolls begin</td>
<td></td>
</tr>
<tr>
<td>9/14/2016</td>
<td>Banner</td>
<td>BANNER Centralized Personal Data Input Cutoff Date</td>
<td></td>
</tr>
<tr>
<td>9/14/2016</td>
<td>PeopleSoft</td>
<td>PeopleSoft Request Submission Cutoff Date</td>
<td></td>
</tr>
<tr>
<td>9/23/2016</td>
<td>Banner</td>
<td>Self-Service</td>
<td>BANNER Self-service Updates</td>
</tr>
<tr>
<td>9/30/2016</td>
<td>Banner</td>
<td>Self-Service</td>
<td>BANNER Self-service Review</td>
</tr>
<tr>
<td>10/1/2016</td>
<td>Banner &amp; PeopleSoft</td>
<td>Both BANNER and PeopleSoft Systems will be Offline</td>
<td></td>
</tr>
<tr>
<td>10/8/2016</td>
<td>PeopleSoft</td>
<td>The PeopleSoft System will return to Online Status</td>
<td></td>
</tr>
</tbody>
</table>
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 Website Link]
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
If you have any questions or feedback, please send to cornerstone@rutgers.edu