

# Florida International University PeopleSoft HR Implementation Update

October 25, 2011

# PeopleSoft Human Resources Project Milestones

| Milestones                           | 2010   |     |     |     |     |        | 2011   |     |     |     |        |     | 2012 |     |        |     |     |     |     |     |     |     |     |     |     |     |
|--------------------------------------|--------|-----|-----|-----|-----|--------|--------|-----|-----|-----|--------|-----|------|-----|--------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
|                                      | Jul    | Aug | Sep | Oct | Nov | Dec    | Jan    | Feb | Mar | Apr | May    | Jun | Jul  | Aug | Sep    | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug |
| 1 Milestone 1                        | ▶▶▶▶▶▶ |     |     |     |     |        |        |     |     |     |        |     |      |     |        |     |     |     |     |     |     |     |     |     |     |     |
| 2 Milestone 2                        |        |     |     |     |     | ▶▶▶▶▶▶ |        |     |     |     |        |     |      |     |        |     |     |     |     |     |     |     |     |     |     |     |
| 3 Milestone 3                        |        |     |     |     |     |        | ▶▶▶▶▶▶ |     |     |     |        |     |      |     |        |     |     |     |     |     |     |     |     |     |     |     |
| 4 Milestone 4                        |        |     |     |     |     |        |        |     |     |     | ▶▶▶▶▶▶ |     |      |     |        |     |     |     |     |     |     |     |     |     |     |     |
| 5 Milestone 5                        |        |     |     |     |     |        |        |     |     |     |        |     |      |     | ▶▶▶▶▶▶ |     |     |     |     |     |     |     |     |     |     |     |
| 6 Production Readiness               |        |     |     |     |     |        |        |     |     |     |        |     |      |     |        |     |     |     |     |     |     |     |     |     |     |     |
| 7 Communications                     |        |     |     |     |     |        |        |     |     |     |        |     |      |     |        |     |     |     |     |     |     |     |     |     |     |     |
| 8 Training                           |        |     |     |     |     |        |        |     |     |     |        |     |      |     |        |     |     |     |     |     |     |     |     |     |     |     |
| 9 HR Go-Live                         |        |     |     |     |     |        |        |     |     |     |        |     |      |     |        |     |     |     |     |     |     |     |     |     |     |     |
| 10 Go-Live Support                   |        |     |     |     |     |        |        |     |     |     |        |     |      |     |        |     |     |     |     |     |     |     |     |     |     |     |
| 11 New Chart of Accts. Configuration |        |     |     |     |     |        |        |     |     |     |        |     |      |     |        |     |     |     |     |     |     |     |     |     |     |     |
| 12 Go-Live: New Chart of Accts.      |        |     |     |     |     |        |        |     |     |     |        |     |      |     |        |     |     |     |     |     |     |     |     |     |     |     |

# Changes Affecting Pay

- Workweek: Saturday - Friday
- Approval Deadlines

| ADP TimeSaver  | PeopleSoft Time & Labor                                 |
|--|---|
| 5 PM Thursday: Employees Approve reported hours/leave Paycodes | 5 PM Friday: Employees Submit reported hours/leave TRCs |
| 2 PM Friday: Time Approver Sign Off                            | 2 PM Monday: Manager Approval                           |
| 2 PM - 5 PM Friday: Payroll Edits                              | 2 PM - 5 PM Monday: Payroll Edits                       |

- No Approvals, No Pay for Hourly Employees

# Changes Affecting Pay

| TimeSaver                             | Time & Labor   |
|---------------------------------------|--|
| Timesheet                             | Timecard   |
| One timesheet with multiple jobs      | Each job instance will have a corresponding timecard with a specific approver          |
| Account based approvals               | Organizational based approvals   |
| Account based security                | Business Unit based security   |
| Can view funding source via Timesheet | Timecard stores only hours for Salaried employees and combo codes for hourly employees |

# Common Department Structure



## University Organizational Department Structure

- Objectives:
  - One common definition of Department for the University
  - Department defined as serving distinct function with a Supervisor in charge of a specific budget and personnel

# Credentialing

- Credentialing system for submission/approval/exception documentation
- Only faculty with appropriate credentials will be available for selection as Primary Instructor in Campus Solutions

# Recruitment Changes

- All administrative, staff, faculty and temporary employees(except GA's and adjuncts) apply on-line
- Online offers for administrative, staff and non-student temporary employees
- Online Sign-on for all benefits eligible and non-student temporary employees
- I-9 & Loyalty Oath notarized

# Automatic Terminations

- Non-student temporary
- Faculty with appointment end dates

Pro-active notifications will be sent to departments and will require a submission of appointment renewal to continue employment



# Payroll Transfers

- On-line payroll transfers integrated with check data
- Unit receiving charge request approves:
  - Expense Manager (department)
  - Project Manager (project)
  - Post Award Grant Manager (project)
- Accommodates transfers from July 2010 forward

# Contract Management

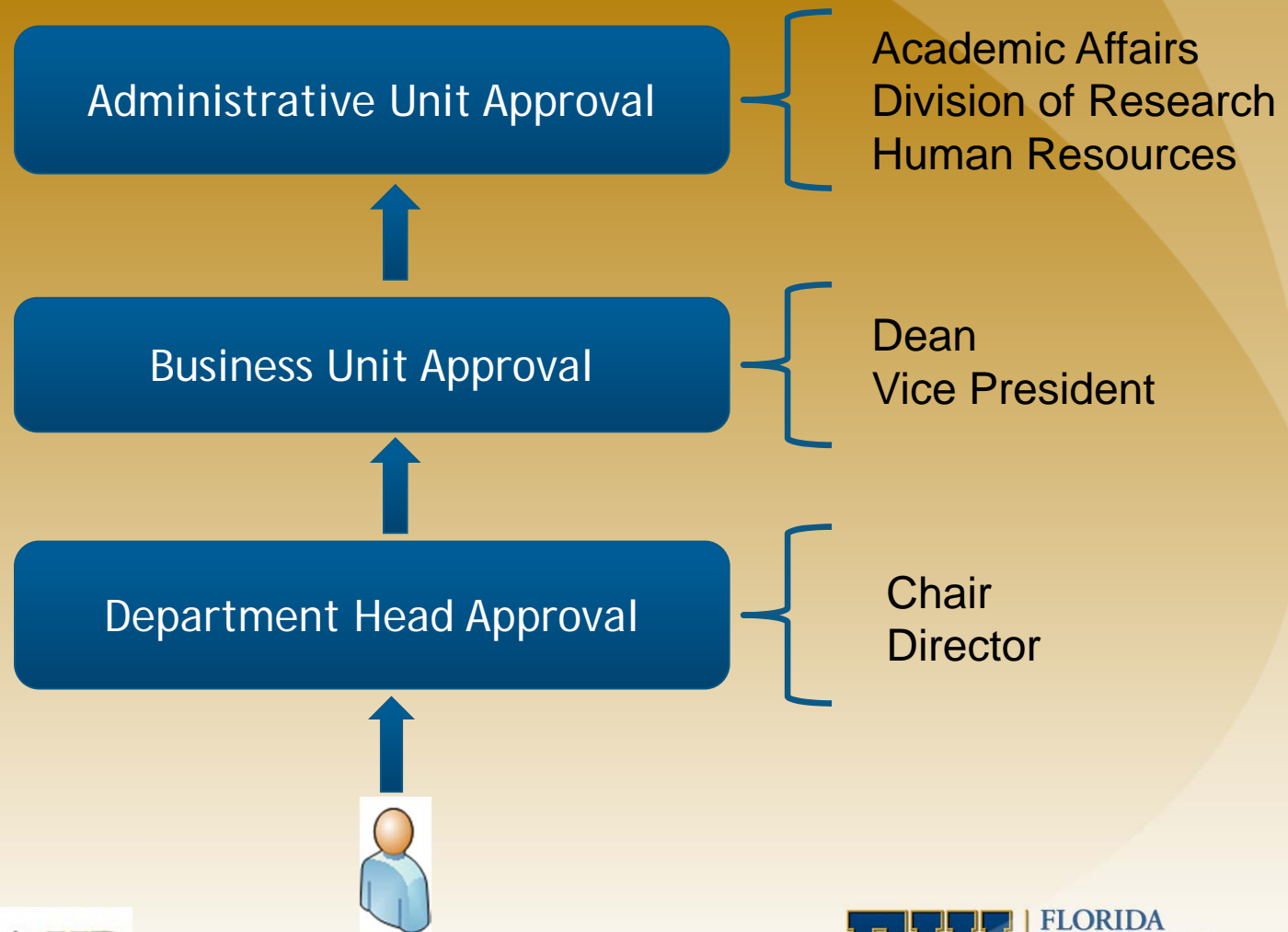
- Consolidate all contract requirement in one system
  - Adjuncts, Graduate Assistants, Overloads, Fee for Service, Temporary Non-Students
- Front end system that will validate courses with assignment for primary instructors
- Workflow enabled three level approval process
  - Department->Business Unit->Administrative Unit

# FIU Business Units

| Business Unit Code | Business Unit Description       | Vice President/Dean |
|--------------------|---------------------------------|---------------------|
| AAAPA              | ACAD. PLAN. & ACCOUNTABILITY    | Vice Provost        |
| AACAR              | COLL ARCHTURE & THE ARTS        | Dean                |
| AACAS              | COLLEGE OF ARTS & SCIENCES      | Dean                |
| AACBA              | COLL. BUSINESS ADMINISTRATION   | Dean                |
| AACEC              | COLL. OF ENGINEERING & COMPUT.  | Dean                |
| AACNH              | COLLEGE NURSING& HLTH SCIENCES  | Dean                |
| AACOM              | COLLEGE OF MEDICINE             | Dean                |
| AAEDU              | COLLEGE OF EDUCATION            | Dean                |
| AAENR              | VICE PRES ENROLLMENT            | VP (TBA)            |
| AAFRM              | FROST ART MUSEUM                | Director            |
| AAHON              | HONORS COLLEGE                  | Dean                |
| AAHOS              | SCH. OF HOSPT. & TOURISM MGMT.  | Dean                |
| AALAW              | COLLEGE OF LAW                  | Dean                |
| AALIB              | LIBRARY OPERATIONS              | Dean                |
| AAOPI              | OFFICE OF PLAN.& INST. RESEARCH | AVP                 |
| AAPHS              | COLL. PUBLIC HEALTH & SW        | Dean                |
| AAPRO              | PROVOST & EXEC. V.P.ACAD.AFFS.  | Provost             |
| AASJM              | SCHOOL OF JOURN. & MASS COMM.   | Dean                |

| Business Unit Code | Business Unit Description  | Vice President/Dean |
|--------------------|----------------------------|---------------------|
| AAUED              | UNDERGRADUATE EDUCATION    | Dean                |
| AAUGS              | UNIVERSITY GRADUATE SCHOOL | Dean                |
| AAUNC              | UNIVERSITY COLLEGE         | Dean                |
| AAVPB              | VICE PROVOST-BISCAYNE BAY  | Vice Provost        |
| AAWLF              | THE WOLFSONIAN             | Director            |
| ADVMT              | ADVANCEMENT                | SVP                 |
| ATHLC              | ATHLETICS                  | Director            |
| BUSFN              | BUSINESS AND FINANCE       | SVP                 |
| CNTRL              | CONTROLLERS                | AVP/Controller      |
| ENGAG              | COMMUNITY ENGAGEMENT       | VP                  |
| EXTRL              | EXTERNAL RELATIONS         | SVP                 |
| FCLTS              | FACILITIES                 | AVP                 |
| GNCSL              | GENERAL COUNSEL            | General Counsel     |
| GVREL              | GOVERNMENT RELATIONS       | VP                  |
| HCNET              | HEALTH CARE NETWORK        | VP                  |
| HUMRE              | HUMAN RESOURCES            | VP                  |
| INTEC              | INFORMATION TECHNOLOGY     | VP                  |
| PRDNT              | PRESIDENT                  | President           |
| RSRCH              | RESEARCH                   | VP                  |
| STDAF              | STUDENT AFFAIRS            | VP                  |

# Standardization of Approvals



# Delegation & Ad-hoc Approvers

- Delegation: Delegation is when a person authorizes another to serve as a his or her representative for a particular task of responsibility. With the Delegation feature, users can authorize other users to perform managerial tasks on their behalf by delegating authority to initiate or approve managerial transactions
- Ad-hoc Approvers: approvers can add other approvers or reviewers to the current or a later stage of the approval process.

# Delegation Terminology

|                          |  |
|--------------------------|--|
| Delegation               | The act a delegating one's authority to another user.  |
| Delegator                | A person that delegates authority to another user.   |
| Proxy                    | A person granted authority to act on behalf of another user.   |
| Delegate Initiation      | The Delegation Framework allows you to separate the task of initiating a transaction from approving the same transaction on someone's behalf. Delegator may delegate authority for a proxy to only initiate or submit a transaction on the delegator's behalf. |
| Delegate Approvals       | The Delegation framework allows you to separate the task of initiating a transaction from approving the same transaction on someone's behalf. Delegator may delegate authority for a proxy to only approve or deny a transaction on the delegator's behalf.    |
| Delegated Authority      | The rights and privileges that are delegated from the delegator to the proxy.  |
| Delegation Request       | A request from the delegator to the proxy to take on delegated authority.  |
| Delegation Period        | The time range in which the delegated authority is in effect.  |
| Delegation Administrator | The system administrator who is responsible for configuring, managing, and maintaining delegated authorities.  |
| Revoke                   | When a delegator or delegation administrator withdraws delegated authority.  |

# Roles for the new system

| Role                 | Function   |
|----------------------|--|
| Manager (Supervisor) | Supervises one or more faculty, staff or temporary employee and will be able to initiate changes in supervisor and enter or approve his/her direct report's time through Manager Self-Service.   |
| Department Manager   | Approves Departmental transactions   |
| HR Liaison           | Views access to the HR System and will serve as a point of contact to answer questions about Bio Demo Data, Salary, Paychecks, Positions, Contracts and Leave Balances. In emergency situations, HR may delegate authority on behalf of the Supervisor or Department Manger. |
| Recruitment Liaison  | Administers candidates through Talent Acquisition Manager(TAM), including reviewing resumes, scheduling interviews , tracking applicant statuses and initiating job offers.  |
| ePRF User            | Requests new positions and modify existing positions, including writing and updating position descriptions through Electronic Position Request Form (ePRF). This individual will also have access to initiate pay changes associated with position-related actions.          |
| Contract Initiator   | Enters a contract and submit for approval and processing. The contract initiator can be specific to Adjuncts, Additional Compensation (ESC/Overload), Graduate Assistants & Fee for Service.   |
| Contract Approver    | Approves submitted contracts at the Business Unit level by contract category.  |

# Recruiting

## Status

- Evaluated conversion and transition strategy of existing job openings and applicants into PeopleSoft Recruiting Solution

## Options

- Hard cut over creates additional conversion requirements, freeze hiring actions for 3 weeks and requires communication to ~16K+ active applicants
- Phase out current solution will allow regular operations to continue but potentially creates confusion for applicants, Recruitment Liaisons and adds additional workload for Recruitment Services & Records

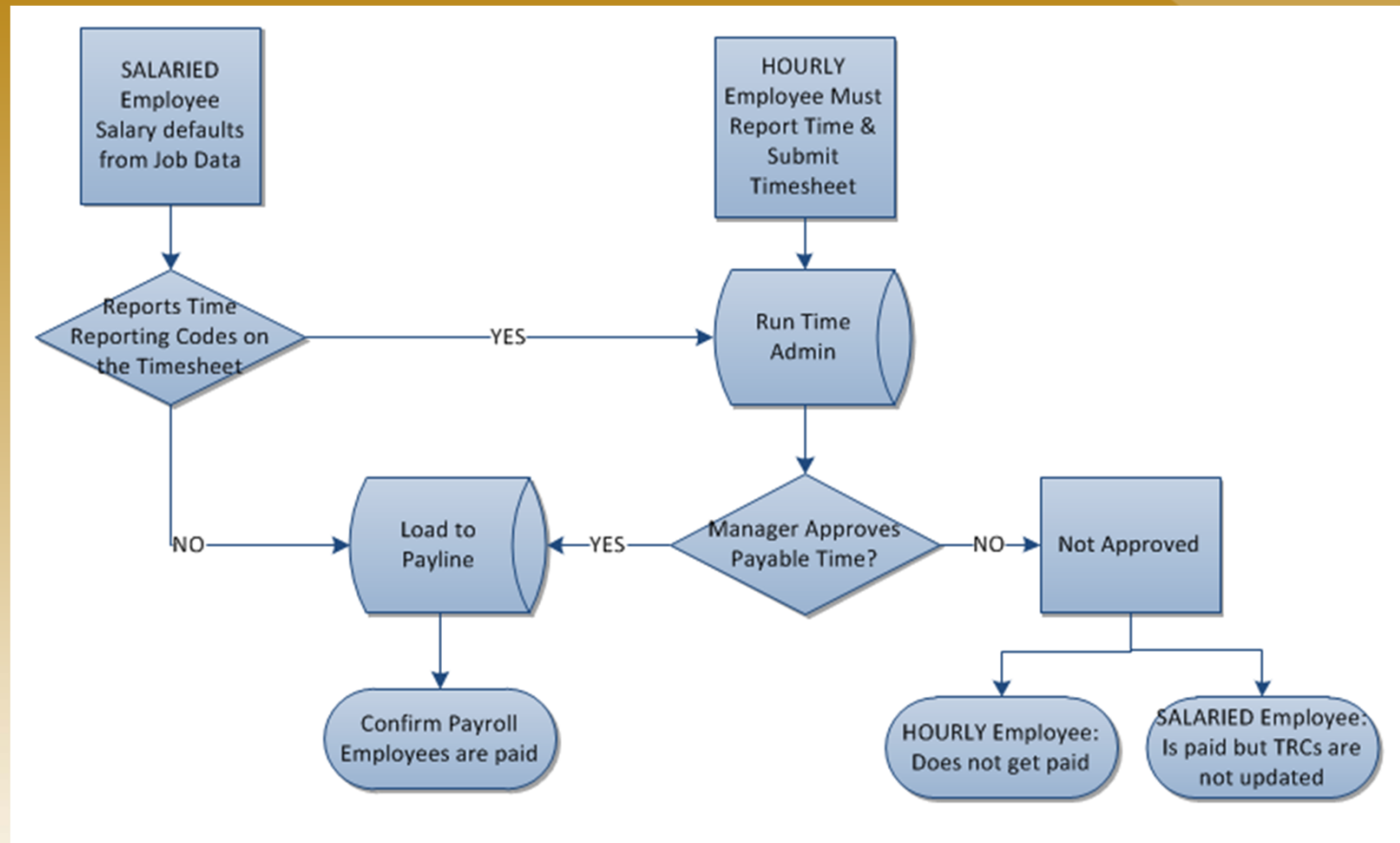


# Recruiting

## Recommendations

- Freeze hiring actions in PeopleAdmin at Go-Live
- All new postings will be created in PeopleSoft Recruitment
- Phase out open postings in PeopleAdmin until filled or six months, whichever is first with consultation with Academic Affairs
- All remaining postings from PeopleAdmin will be converted to PeopleSoft after six months from Go-Live

# Business Process: Salaried vs. Hourly



# Questions?