

EIS User Group

Agenda

- Campus Solutions Upgrade
- A Year in the life of EA
- UNT's Intelligent Capture for Transcripts
- ePAR Phase II
- EIS Projects and Artifacts

About

The Enterprise Information Systems (EIS) User group consists of key users from across the UNT System representing each of the module areas supported within EIS. This group meets with Enterprise Application Services technical leads and directors several times a year to share information of interest to the broader EIS population. Each meeting includes a high level review of upcoming maintenance and upgrade events as well as an opportunity to ask questions about that schedule. The meeting also provides time to hear about the latest strategic initiatives, major projects and success stories related to EIS.

Did you know...

EIS was originally implemented **15** years ago. The Finance system went live in 2003, followed by a joined Learning Solutions (Campus Solutions, Advancement and HCM) system in 2004 along with the portal.

The original budget for the EIS implementation was **\$20 million**. The project was completed on time and on budget.

Did you know...

The 2003/2004 EIS implementation was a joint effort by UNT and the UNT Health Science Center. UNT Dallas was still **6** years away from becoming a separately accredited campus. The UNT System Shared Services organization and the UNT College of Law would not become fully established until 2011 and 2014 respectively.

Did you know...

Today EIS represents **3** separate Pillar Systems(Campus Solutions, HCM, and Finance), Hyperion Planning, Enterprise Learning Management and the Portal – all operating in support of **3** separately accredited campuses and the UNT System.

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- UNT's Intelligent Capture for Transcripts
- ePAR Phase II
- EIS Projects and Artifacts

Campus Solutions 9.2 Upgrade

Linda Wallace





Who is Involved?

- Steering Committee

- Shannon Goodman
- Stephanie Holley
- AJ Randolph
- Joey Saxon



- Project Team

- Includes all Subject Matter Experts, Module Leads, ITSS EA Teams

- Core Team

- Key people from Project Team - functional and technical

- Fluid Delivery Team

- Members appointed by Steering Committee and Module Leads

- Fit/Gap Workshop Teams

- Module Leads and Subject Matter Experts

Who is Involved from ITSS?

- Core Team ITSS

- Mohammad Asadul Haq – Project Manager
- Linda Wallace – Technology Sponsor
- Mike Shirley – Application Lead(Admissions/Student Records)
- Jenny Brooks – Application Lead(Financial Aid/Student Finance)
- Michelle Elliott – Lead Upgrade Analyst
- Jason Myre – Tech Lead (Infrastructure)
- Vicky Walker-Brooks – Security Lead
- Alan Wilson – Portal Transition Lead/Tools
- Kristina Randolph – PHIRE/Migrations
- Yevgeny Armor – Integrations Lead
- Andy Brockett – Testing Lead



- Project Team ITSS

- Student Admin tech teams, select members of EA Tools, Security and Infrastructure teams

CS9.2 Upgrade has 3 distinct parallel tracks of work



You may be responsible for project tasks in multiple roles





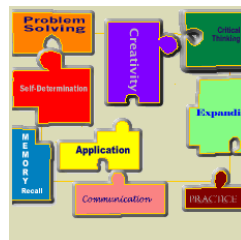
CS9.2 What have we accomplished?

- February 1 development freeze = ITSS is not working on new projects in CS9.0, other than critical fixes and required production functionality maintenance
- Currently working on applying Bundle 49 in CS9.0
- The majority of the Fit Gap Sessions have been completed with Highstreet
- Oracle is on site delivering CS9.2 Upgrade environments
- Recurrent user meetings have been scheduled across campuses



CS9.2 Fit Gap Workshop Sessions Status

- Needs Assessment Fit Gap Workshops with Highstreet have been completed for Admissions, Student Records, Financial Aid, Academic Advising and Campus Community.
- Needs Assessment for Student Financials was rescheduled to June 18-21
- Highstreet will analyze the outcomes of Fit Gap Workshops and deliver a proposed Roadmap of projects/improvements for possible development and delivery during 2019



What big changes do we get with this upgrade?

- Improved student user experience in EIS on all devices – Fluid is Oracle’s answer to device responsive design
- Administrative Staff and Faculty user experience in CS9.2 different look/feel

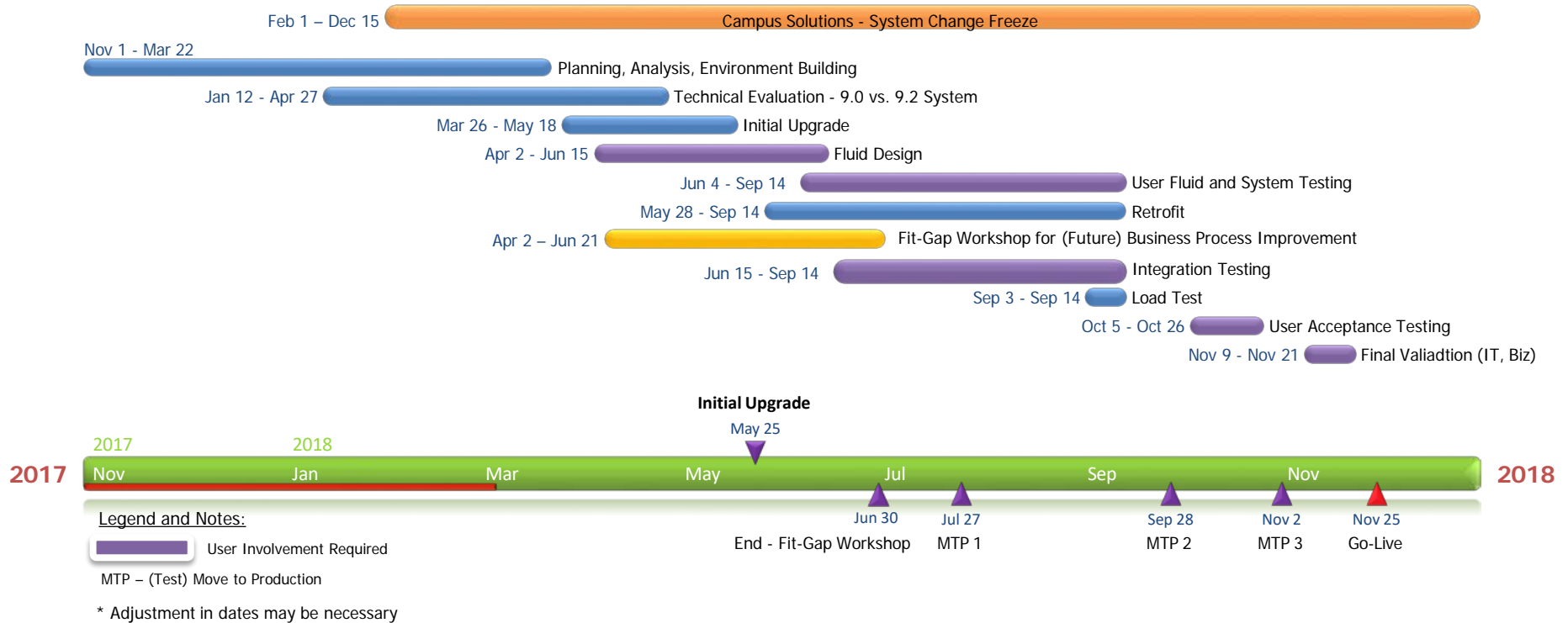


When will all of these things happen?

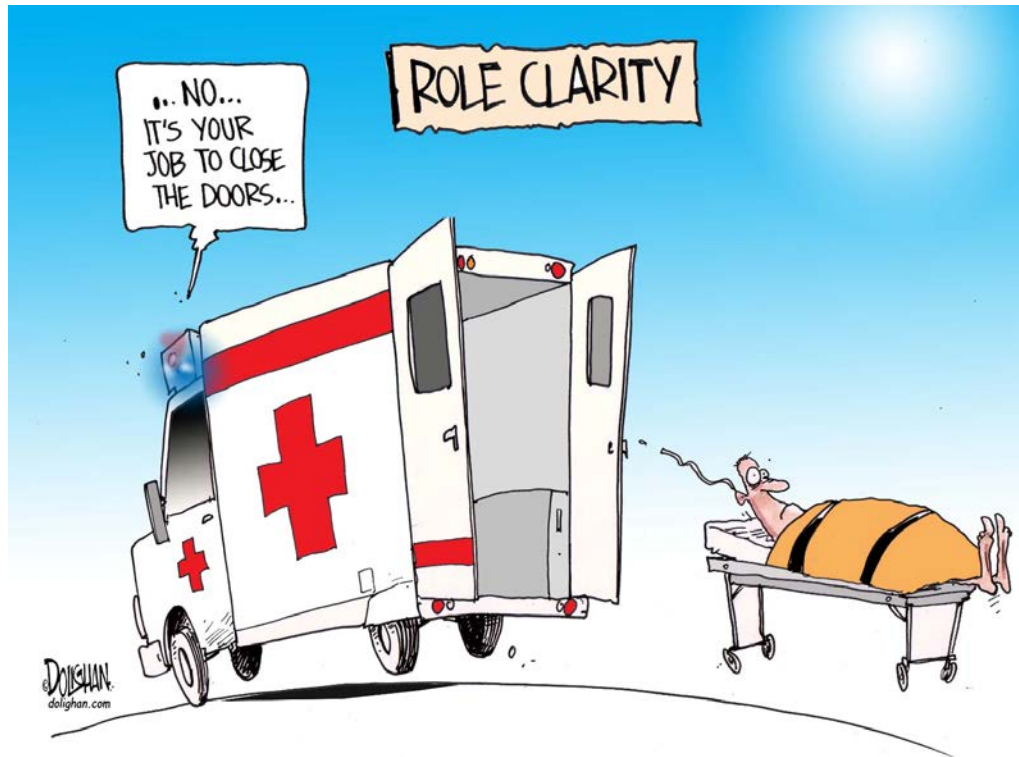
- April/May/June - Needs Assessment/Fit Gap workshops and Roadmap
- Early June - CS9.2 upgrade environment (LSQAU) available for users to begin exploration and testing
- June/July – Fluid Design Team sessions to evaluate Student Self-Service customizations and bolt-ons
- June – September – Testing of all functionality, including Fluid, in LSQAU
- June – September - Integration testing of business processes across modules
- September – October – Final User Acceptance Testing (UAT) and approvals
- November – Final CS9.2 validations and approvals to go-live
- November 22-25 (Thanksgiving weekend) – Go-live and system validation



Campus Solutions 9.2 Upgrade Timeline Today



What can I clarify for you?



A Year in the Life of Enterprise Applications

Jason Myre

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Year in the Life of Enterprise Applications 2018/2019

	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May
Campus Solutions (bundle/image)	Bundle 49			50 / 10			51 / 11			Image 12			Image 13
Financial Image Update	27					29						31	
HCM Image Updates		26			27			28			29		
ELM Image Updates						18							
Portal Image Updates	6				7								
Campus PeopleTools Upgrade			8.55.23										
Financial PeopleTools Upgrade	8.55.23				8.56.8								
HCM PeopleTools Upgrade			8.55.23	8.56.8									
ELM PeopleTools Upgrade		8.55.23				8.56.8							
Portal PeopleTools Upgrade		8.55.23		8.56.8									
Perceptive Content		7.2											
Phire Updates	8.56.8				13.2								
Cypress		7.5.1.23						8.x					

In Progress/Completed
Planned
Proposed

Intelligent Capture for Transcripts - UNT

Keitha Robertson





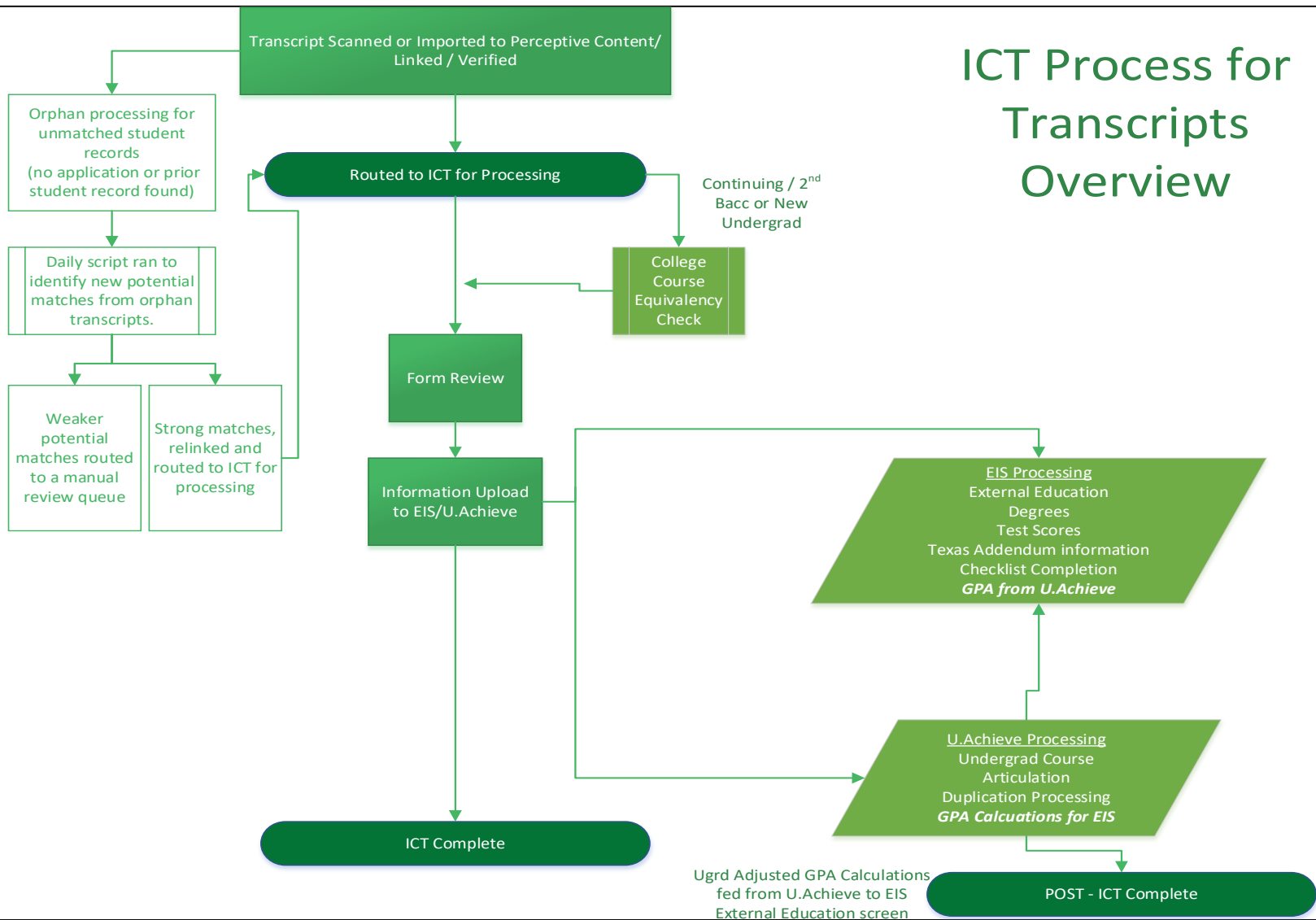
- Intelligent Capture for Transcripts
- Additional functionality to Perceptive Content
- Manage processing of transcripts received from other schools
 - High School
 - College
- OCR (Optical Character Recognition)
- More automated data entry
- Streamlined processing of student data and course articulations

Challenges

- Highly complex requirements for the technology
 - Involving integrations across **3** separate systems
 - Multi-departmental
- Lengthy timeline
 - (Jan 2017 – Mar 2018)
- Development that was new for the vendor
- Resource intensive for all involved
- Vendor / Consultant changes
- Changing of business processes



The Process



ePAR – Phase II

Dorothy Cummings



Agenda

Background

Where are we now?

Where are we headed?

Background

The Case for Change

- In 2011 - Survey feedback from customers indicated the need to address Human Resources Management (HRM) form processing
- There were 8 different commonly used HRM forms, some requiring add'l documentation
- 194 respondents to survey across UNT System
 - Most common requests from customers
 - Wanted an effective tracking system
 - Wanted electronic system to eliminate the need to physically walk forms from one office to another across campus
 - Wanted to eliminate multiple HRM form types
 - Wanted a system 'like ePro' that had the familiar look and feel and electronic approval functionality

Approach Taken

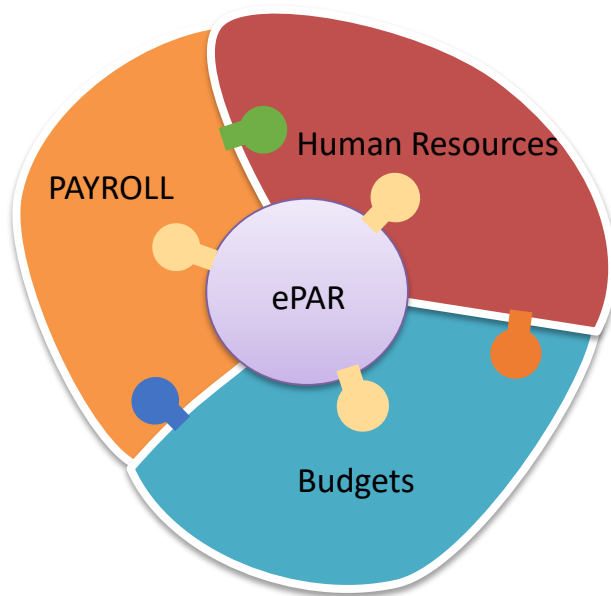
- Decision made to build versus buy in late 2011
- Approved by Shared Services Council
- Created committee of representatives from each campus in areas of:
 - Human Resources
 - Payroll
 - Budgets,
 - Internal Audit
 - Research/Grants,
 - Information Technology
 - Provost Office (faculty HR at UNT),
 - Business Service Center (serve as chair)
- Project kicked off January 31, 2012
- First transaction processed in production system September 7, 2012
 - Phased implementation and departmental access
 - Started with hires and terminations only (September 2012)
 - Added funding changes (December 2012)
 - Added all other employee-related changes (June 2013)
 - All departments using ePAR (June 2013)
- Implemented suggestions made by customers during focus groups, training sessions or other venues
- Streamlined approval paths for workflow and reviewed processes along the way

What are we doing now?

Interconnectivity of ePAR

Examples of PeopleSoft Tables Updated/Actions Taken by ePAR

- Job Data
- Additional Pay
- Personal Data Jr
- Position Data
- Department Budget
- Benefits Activity Report
- Assignment to Benefits program
- Enrollment into Time and Labor Workgroup
- Enrollment in Comp Plans (1.0, 1.5, and Star Performer)
- Reverse future-dated eLeave requests upon termination
- Payroll Data
- Tax Tables
- Retroactive transactions for Payroll Adjustments
- Payroll Hold Status
- Overpayment and Time & Labor Payline Adjustments
- Security data (assignment of primary permission list and ELM Learner and Non-Learner roles)



Current Transaction Types Available

1. Hiring/Terminating

- Hire – all appointments types and circumstances
- Terminate – all appointment types can be processed via ePAR (or mass termination process)

2. Employee Changes (monetary and non-monetary impact)

- Base rate adjustments [merit, market, equity, etc.]
- Non-base rate adjustments [augmentations, allowances, etc.]
- FTE changes
- Promotion/demotion/reclassification
- Leave with/without pay
- Return from leave with/without pay
- Funding source changes
- Reports To/Supervisor changes

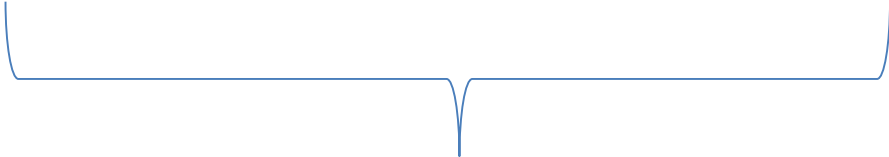
3. Employee Transfers (moving departments in same institution)

ePAR Transaction Data Since Inception (5.5 Yrs)		
<i>Type</i>	<i>Count</i>	<i>Yearly Average</i>
Hires	88,252	16,046
Terminations	21,949	3,991
Employee Changes	67,040	12,189
Employee Transfers	905	165
Total	178,146	14,846

- Immigration compliance (I-9/e-Verify)
- Pay grade compliance
- Forced reasons for salary changes
- Instruct to attach supporting documentation where appropriate
- FTE management
- Provide warning messages for multiple jobs (ACA)
- Enforce termination dates
- Enforce Career Center requisition number for student hires (UNT)
- Record warning messages with ePAR
- Chartstring entry guidance & validation
- Ensure funding dist % = 100%
- Force end dates on certain additional pay items
- Stop pay when epar submitted for LWOP, Terminations and SWB
- Force reasons for LWOP status (e.g. military, personal, etc.)
- Force reasons for late submittals, denials and pushbacks
- Enforce job codes with positions/appointments (e.g. CWS can't be in a position)

ePAR Approvers

1. AVC/AVP/Dean
2. Budget Office
3. Campus HR
4. Career Center (UNT)
5. Chancellor/President
6. Clinical Trials (HSC)
7. College Budget Officers
8. Department Head
9. Deptid/Projid Holder
10. Financial Aid
11. Provost Office (UNT)
12. Research/Grants Office
13. Supervisor
14. UNT Health (HSC)
15. Vice Chancellor/Vice President
16. VP Research Office (UNT)



Depending on transaction as determined by each campus

HRM Forms Transitioned to ePAR

Form	Purpose	Institution(s)	Replaced by ePAR
HRM 4	Position Updates	UNT/UNTD/UNTS	In Progress
HRM 5	Posting Vacancies	UNT	In Progress
HRM 6	Payroll authorization for regular employees & all employees at UNTHSC	UNT/UNTD/UNTS/ UNTHSC	In Progress for HSC position Changes; All other, Yes
HRM 7	Payroll authorization for part-time faculty and graduate students	UNT/UNTD	Yes
HRM 8	Payroll authorization for Hourly employees	UNT/UNTD/UNTS	Yes
HRM 9	Payroll authorization for leave payouts (vacation/comp time/death sick leave)	UNT/UNTD/UNTS	Yes
HRM 11	Payroll authorization for Task Payments	UNT/UNTD/UNTS	Yes
HRM 12	Payroll authorization Summer appointments	UNT/UNTD	Yes

- Donna Asher, Associate Vice Chancellor
 - Program oversight
 - Program planning & development
 - Troubleshooting
 - Testing
 - Communications
 - Training (face-to-face and online)
 - Coordinating enhancements/updates
 - Workflow administrator (delegation & routing support)
 - Daily customer support via phone and email

Where are we headed?

A. Position Changes (used for vacant positions only)

- Add/End/Inactivate position
- Funding changes
- FTE change
- Department/Reorganization changes (Transfers)
- Reclassification

B. Requests to Refill and Post a Position

- Post a vacancy through HR Talent Acquisition

C. Overlap Requests

- Allow 2 people to fill a position for a temporary time period

- Implementation: Summer 2018

HRM Forms Transitioned to ePAR Phase 2

Form	Purpose	Institution(s)	Replaced by ePAR Phase 2
HRM 4	Position Updates	UNT/UNTD/UNTS	Yes
HRM 5	Posting Vacancies	UNT	Yes
HRM 6	Position Changes	HSC	Yes

- Expanding department budget table functionality
- Set hire date to first day of the month when employee's hire date is first working day of the month
- Collect data for employees who will work with minors
- Automatically enroll/waive premium reserve benefit plans where appropriate

Questions?

Enterprise Applications – Facts and Figures

Robert Jones

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Project Summary

62 - Projects **Completed** in Last 12 months

Active Projects					
Sub-division	Level 1	Level 2	Level 3	Level 4	Total
SAST - Linda	8	0	1	1	10
FAST - Kem	13	2	1	7	23
EATS - Robert	14	1	1	2	18
TOTAL	35	3	3	10	51

- SAST – Student Administration Systems
- FAST – Human Capital Management (HCM) , Finance, and Constituent Relationship Management (CRM)
- EATS – Portal, PeopleTools, EIS Security, Imaging Services, PeopleSoft and non-PeopleSoft Application Administration

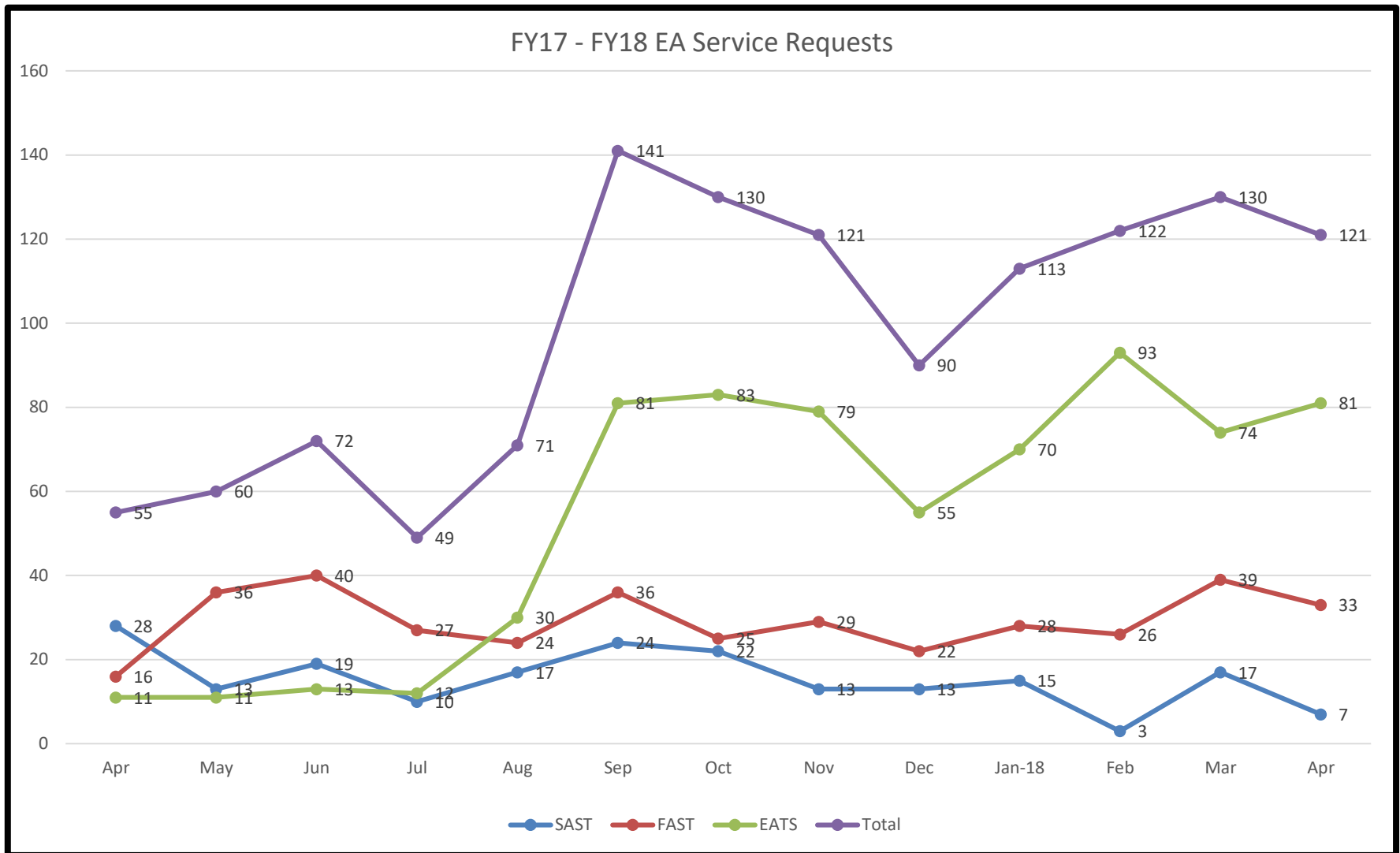
Service Requests and Incidents

Closed in April

Sub-division	Service Requests	Incidents
SAST - Linda	7	37
FAST - Kem	33	63
EATS - Robert	81	36
TOTAL	121	136

- SAST – Student Administration Systems
- FAST – Human Capital Management (HCM) , Finance, and Constituent Relationship Management (CRM)
- EATS – Portal, PeopleTools, EIS Security, Imaging Services, PeopleSoft and non-PeopleSoft Application Administration

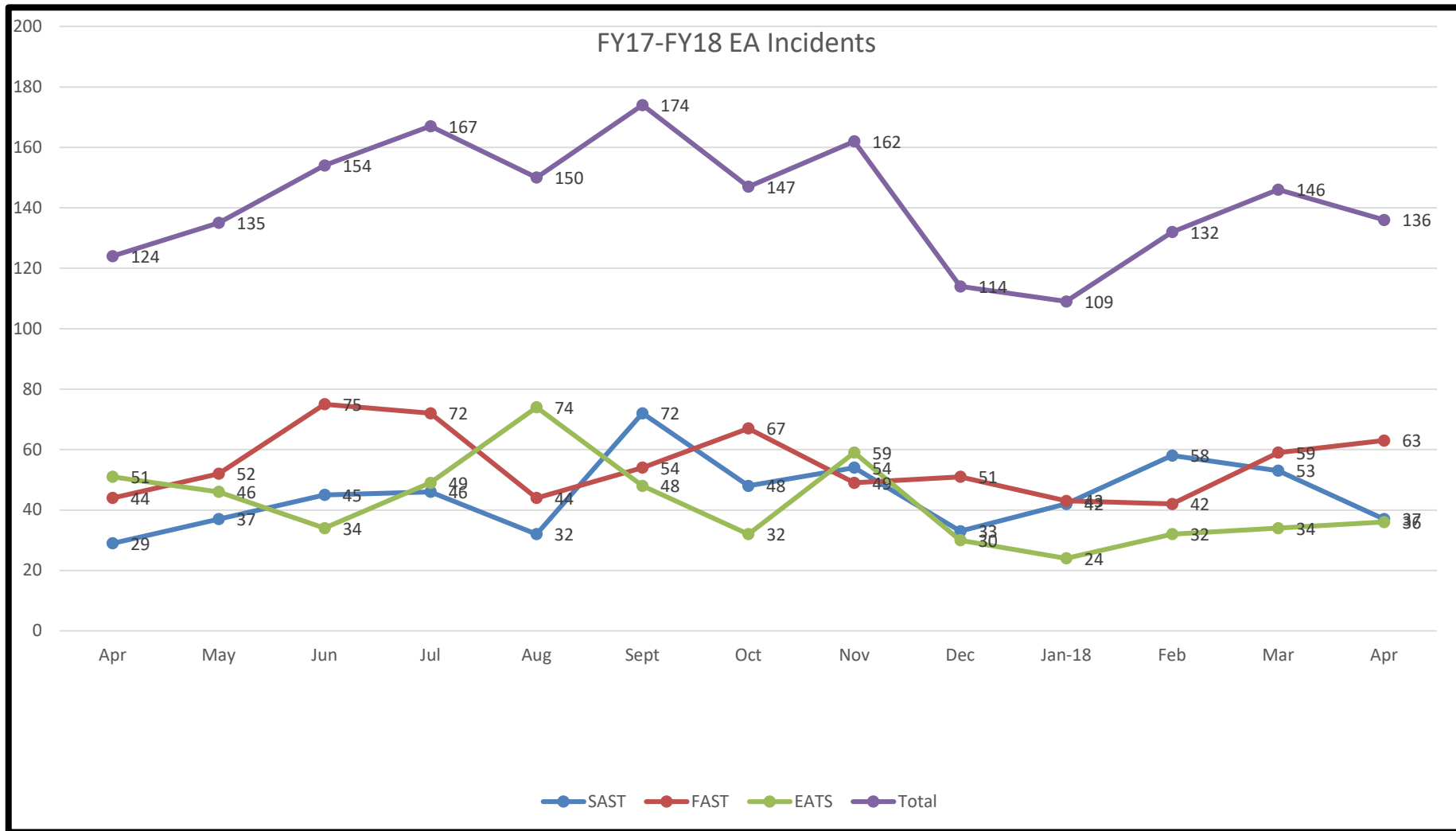
Service Requests – Past 13-months



Incidents – April 2018

Assignment group	Count		Sub-Div	Count
ITSS-EA Admissions Systems Count	12		SAST	37
ITSS-EA Const Rel Mgmt (CRM) Count	1		FAST	63
ITSS-EA EIS Security Admin Count	11		EATS	36
ITSS-EA EIS Tools and Portal Count	1		Total	136
ITSS-EA Enterprise App Spt Count	7			
ITSS-EA Fin Aid - Scholarship Count	4			
ITSS-EA Finance Systems Count	31			
ITSS-EA Human Resources Count	19			
ITSS-EA Imaging Services Count	10			
ITSS-EA Payroll-Time-Labor Count	12			
ITSS-EA PeopleSoft App Spt Count	3			
ITSS-EA Production Control Count	4			
ITSS-EA Student Finance Count	4			
ITSS-EA Student Records Count	17			
Grand Total	136			

Incidents – Past 13-months



Contains: Application/Module/Functionality White papers

Instructional Videos – Product Features and Configs

PeopleBooks and Other Documentation

Links to Training Content and Oracle University

News Items

Conference Info

PeopleSoft Information Portal

PeopleSoft Information P... x +

https://docs.oracle.com/cd/E52319_01/infoportal/index.html

ORACLE

PeopleSoft Information Portal

Everything you need to know in one place

PeopleSoft Key Concepts

PeopleSoft Innovation and Customer Success

PeopleSoft Key Concepts

PeopleSoft Innovation and Customer Success

BREAKING NEWS

05/02/2018
Now showing on the PeopleSoft Video Channel:
PeopleSoft Talk with Marc Weintraub: The PeopleSoft User Experience featuring Matthew Haavisto.

04/25/2018
Now showing on the PeopleSoft Video Channel:
Image Highlights, PeopleSoft HCM Update Image 26

04/24/2018
Oracle Announces PeopleSoft Innovators at COLLABORATE 2018.

04/24/2018
Now Showing on the PeopleSoft Video Channel:
PeopleSoft Spotlight Series: PeopleSoft Mobile Inventory Management Supporting HIBC - Image 22.

04/13/2018

The screenshot shows a web browser window displaying the PeopleSoft Information Portal home page. The browser's address bar shows the URL: https://docs.oracle.com/cd/E52319_01/infportal/index.html. The page features the Oracle logo at the top center, followed by the heading "PeopleSoft Information" and the tagline "Everything you need to know in one place". Below this, there are two main content areas: "PeopleSoft Key Concepts" and "PeopleSoft Innovation and Customer Success", each accompanied by a photograph of business professionals in a meeting. On the right side, a dark sidebar menu is open, listing various navigation options: Home, Human Capital Management, PeopleTools, Financial Management - Enterprise Services Automation - Asset Lifecycle Management, Campus Solutions, Interaction Hub, Supplier Relationship Management - Supply Chain Management, Customer Relationship Management, Enterprise Performance Management, PeopleSoft Key Concepts, About PeopleSoft, and News. At the bottom of the browser window, a notification bar states: "Firefox automatically sends some data to Mozilla so that we can improve your experience." and a "Choose What I Share" button is visible.

