Electronic Timekeeping: Training & Reference Materials

Electronic Timekeeping is a project to implement Kronos as the official campus timekeeping system. When completed, employees’ time and attendance data will be gathered electronically and exported to the campus payroll system.

In addition to transferring production environments and setting up data import interfaces, a critical part of upgrading the campus electronic timekeeping system from Kronos version 6.3 (currently in use) to version 7 is the development of new training and reference materials. The materials are designed to meet two needs:

- Provide information on the new functionality and interfaces we’ll see with version 7.
- Greatly expand the resources available to timekeepers, supervisors, and employees on how to accomplish timekeeping tasks in Kronos.

Developing the new materials are Kronos Customer Support/Quality Assurance analysts David Lippold and Shajan Kay, who bring previous experience working at UCSB together with a commitment to customer service. David, who joined the Kronos project team in December, has a background in customer service, communications and business systems. Shajan joined the Kronos team at the beginning of April, and brings with him information systems management experience.

Assisting the Kronos project team are veteran Kronos users Kim Dwire (H&RS), Kari Samlaska (FM), and Sheri Walker (ERI), all of whom were involved in the development of the original Kronos 6.3 manuals along with ARIT Kronos guru Sunny Reiner. In addition to updating the timekeeping manuals for Kronos v.7, the team is also drafting job aids, documenting procedures, and developing references that have been requested by campus timekeepers, which include the following:

- Glossaries and indexes that define the components of pay rules, accrual profiles, labor level account strings, and other Kronos terminology.
- Job aids on how to set up limited, contract, career, and student employees in Kronos.
- Procedures on topics such as handling payroll close (biweekly and monthly), separating employees in Kronos, handling catastrophic leave, and reconciling leave accruals.
- How-to sheets on a variety of processes, including: updating accruals, approving overtime, running reports, and making retroactive adjustments.

We continue to solicit input from various stakeholder groups as we develop these training materials.

Meet your Kronos Support Team

David Lippold

Shajan Kay

FOR MORE INFORMATION

PROJECT WEBSITE
ets.ucsb.edu/projects/timekeeping-kronos

PROJECT MANAGER
Ann Dundon
(805) 893-8811
Ann.Dundon@pmo.ucsb.edu
Financial System Timeline Extension

The Financial System Implementation Project (FSIP) is a phased implementation of PeopleSoft Financials to modernize UCSB’s financial system, move systems off of the mainframe, and dramatically improve the stability and functionality of UCSB’s financial system.

The sponsors of the Financial System Implementation Project announced an extension of the Phase 1 project timeline to allow for more extensive testing in a memo to the UCSB community on April 3rd. The memo stated that “the remaining tests required by University policies and external regulations cannot be completed in time to permit an April 30, 2014 go-live. Since the new system shares information with a complex web of applications, very thorough testing is required in order to mitigate the business risk to the campus.”

The project team is evaluating the availability of resources, the outcome of additional testing and the impact of key business cycles, such as the year-end close, to determine the new go-live date.

Over the past few months the project team has focused on System Integration Testing (SIT), a process in which they verify that the new system maintains the integrity of our data and can operate in coordination with other campus systems. Since our requirements related to the data conversion, interfaces, reports, and workflows are more in quantity and complexity than originally anticipated, SIT has taken longer than expected to complete.

Once two phases of SIT have been completed successfully, the team will advance into User Acceptance Testing (UAT), which is when the Business & Financial Services staff members verify that they can do their jobs using the new system (PeopleSoft Financials). Campus departments should not experience any major changes after the go-live date in Phase 1, with the exception of Business & Financial Services. If any changes do come to light during testing, the impacted employees will be notified so that additional training can be completed prior to the Phase 1 go-live.

UCPath Wave 1 Go Live Strategy

UCPath is a UC system-wide mandate to replace PPS and standardize Payroll, Academic Personnel, and Human Resources processes across all locations.

The system-wide UCPath Executive Leadership Team approved a deployment strategy that lays out the go-live sequence for the Wave 1 UCPath pilot sites during its March 12 meeting. Under the newly approved deployment sequence, UCOP will rollout first, followed by UC Santa Cruz and then a combined deployment at UCLA, UCLA Medical Center, UC Merced and ASUCLA. The approach being used by project leaders Mark Cianca and Sabu Varghese is typically called a “crawl, walk, run” strategy.

UCOP represents the “crawl” phase of the project because of its small population. UCOP presents an additional challenge because the UCLA campus processes its payroll. As a result, some aspects of UCOP will be “de-integrated” from UCLA in preparation for go-live.

“There are many reasons that make UCOP an ideal first site,” said Sabu Varghese, UCOP project director. “However, it’s important to note that President Janet Napolitano specifically requested that UCOP go first. She told us that she believes in this project and wanted to demonstrate her support by having UCOP go-live first.”

UCOP is currently scheduled to go live at the end of 2014. Following UCOP’s implementation, UC Santa Cruz will implement UCPath as part of the “walk” phase.

These two smaller implementations will enable the UCPath Center to gradually ramp up staffing and operations as it prepares for the “run” phase with a large multi-location group that includes a medical center.

Following the UC Santa Cruz implementation, UC Merced will implement UCPath concurrently with UCLA largely because its payroll is also processed by UCLA. ASUCLA, which has its own PPS instance has 2,000 employees and will also implement UCPath at the same time.

Deployment dates for the locations following UCOP will depend on the Integrated Work Plan (IWP). All UCPath project teams at all locations are developing project plans that will be linked with central team plans to create a single system-wide integrated work plan for UCPath.

FOR MORE INFORMATION

PROJECT WEBSITE
ets.ucsb.edu/projects/financial-system

PROJECT MANAGER
Jessie Masek
(805) 893-4196
Jessie.Masek@pmo.ucsb.edu

FOR MORE INFORMATION

PROJECT WEBSITE
ets.ucsb.edu/projects/ucpath

PROJECT MANAGER
Maria Ayllon
(805) 893-3401
Maria.Ayllon@pmo.ucsb.edu
Connect Email & Calendaring Project Update

Connect is UCSB’s new communication and collaboration service. The core components include e-mail, calendaring, contacts, tasks, and mailing lists.

The Connect Email & Calendaring project continues to evolve. Through discussions with the Connect Governance Group and other stakeholders over the past few months, it has become clear that there are diverse, and sometimes conflicting, expectations for an email and calendaring service. For some users, email is their most essential productivity tool, while for others, both email and calendaring are equally essential. Furthermore, a recent customer satisfaction survey conducted by Enterprise Technology Services (ETS) indicated that, while a narrow majority of Connect users are satisfied with Microsoft Office365, a significant minority remain dissatisfied.

In the last newsletter, we informed the campus that ETS was pursuing an on-campus Exchange server to fulfill the goals of the Connect project. Since then, Microsoft has reached out to UCSB and committed to resolve the Office365 product and support issues. In response, ETS staff members have been working closely with the Microsoft Office365 support team to address those issues.

The Connect Governance Group met on Friday, April 4 to review the status of the Microsoft Office365 service and the degree to which customer concerns have been addressed. The general consensus was that Microsoft Office365 still does not meet the campus needs, and that alternative technical possibilities need to be investigated. ETS is notifying Microsoft that UCSB users require resolution of outstanding product and support issues immediately. In parallel, the Connect Governance Group will form a taskforce to identify alternative solutions. Once the taskforce is formed, the membership and charter will be announced by the Connect Governance Group.

A number of campus departments have communicated their intention to move forward with Google Apps for Education for email, while others remain firmly committed to Microsoft Office365. Recognizing these diverse needs, ETS is actively partnering with the Connect Governance Group to provide an interoperable email and calendaring service that is reliable in our heterogeneous campus IT environment.

Oracle Calendar Update

ETS has recently learned that Oracle will continue to provide “sustaining support” for Oracle Calendar. Therefore, the concern regarding a loss of Oracle Calendar functionality has decreased while a solution for integrated calendaring and email is determined.