PRESENTATION AGENDA

1. Project Status
   - Overview
   - UCPath
   - Kronos
   - Financial System

2. Comments & Questions
## MASTER TIMELINE

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
<td>Q1</td>
</tr>
<tr>
<td></td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
<td>Q1</td>
</tr>
<tr>
<td></td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
<td>Q1</td>
</tr>
<tr>
<td></td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
<td>Q1</td>
</tr>
<tr>
<td></td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
<td>Q1</td>
</tr>
<tr>
<td></td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
<td>Q1</td>
</tr>
<tr>
<td></td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
<td>Q1</td>
</tr>
<tr>
<td></td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
<td>Q1</td>
</tr>
<tr>
<td></td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
<td>Q1</td>
</tr>
<tr>
<td></td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
<td>Q1</td>
</tr>
<tr>
<td></td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
<td>Q1</td>
</tr>
<tr>
<td></td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
<td>Q1</td>
</tr>
</tbody>
</table>

### Financial System
- **Preparation** (2011 Q1-Q2)
- **Phase 1** (2011 Q3-Q4)
- **Phase 2 (Pending Review)** (2012-2015)

### UCPATH Project
- **Planning** (2012 Q1-Q3)
- **Preparation** (2012 Q4)
- **Go Live** (2013-2015)

### Kronos Timekeeping
- **Phase 1** (2013 Q1)
- **Continuous Improvement** (2014-2015)

### Procurement Gateway
- **Phase 1** (2014 Q1)
- **Phase 2** (2014 Q2)
- **Continuous Improvement** (2015-2015)
UCPath
UCPATH: GOAL

A UC system-wide project to streamline and standardize payroll and human resources processes across all UC locations.

- **Standardize**
  - Payroll & HR Business Processes

- **Implement**
  - Oracle/PeopleSoft HCMS (Human Capital Management)

- **Share**
  - Riverside Service Center
UCPATH: TIMELINE

Go Live Dates

Wave 1:
July 1, 2014 – Los Angeles, Merced, Santa Cruz

Wave 2:
January 1, 2015 – Davis, Riverside, San Diego

Wave 3:
July 1, 2015 – Santa Barbara, Berkeley, Irvine & San Francisco
UCPATH: STATUS

Local implementation started on May 15, 2013 with these workstreams:

Business Process Alignment

Data Conversion

Interface Development
UCPATH: WORKSTREAMS

Business Process Alignment
alignment of the campus’s local processes with those offered at the UCPath Center

Units Impacted by the Alignment
• Human Resources
• Benefits
• Academic Personnel Office
• Information Technology Services
Data Conversion
conversion and migration of local data from PPS and non-PPS systems to the UCPath Center

Key Steps
• collecting non-PPS data
• Validating data mapping
• cleansing data throughout the conversion process
• writing scripts to test the data after the conversion
• obtaining sign-offs on the quality of the outcomes
UCPATH: WORKSTREAMS

Interface Development
local enterprise applications will need to share information with the UCPath Center

Key Interfaces
• Financial System (PeopleSoft Financials)
• Data Warehouse
• Online Timekeeping (Kronos)
KRONOS
TIMEKEEPING
KRONOS: GOAL

Implement Kronos as the official campus timekeeping system
KRONOS: RESOURCES

Project Manager
Ann Dundon

Kronos System Administrator
Coming soon
KRONOS: ADVISORY COMMITTEE

Jeanie Cornet, NRI
Laurie Eusey, ICB
Maureen Evans, MRL
Sandra Hammonds, Physics
Mike Moore, ECE
Kathy Murray, Film & Media

Juli Pippin, Engineering
Lynne Pritchard, Psychology
Dorothy Satomi, EVC’s Office
Donna Trimble, Chemistry
Joyce Wolever, MSI
Testing

Fixed allocation rules are a potential enhancement for the existing Kronos Workforce Central installation that will allow:

• tracking variable multiple funding sources on timecards

• processing timesheets for employees with multiple distribution numbers
KRONOS: DEPLOYMENT

Active Users
5,400 UCSB employees are now using Kronos

Student Affairs
Almost all SA employees are now using Kronos

University Center
Scheduled to complete deployment in August
KRONOS: NEXT STEPS

- Standardize timekeeping practices
- Finalize technical requirements
- Develop deployment timeline
FINANCIAL SYSTEM: GOAL

Implement PeopleSoft Financials

Get off the current mainframe

Business process review

MAJOR EFFICIENCIES

Real-time

Transparent

Reporting
PHASE 1 DELIVERABLES

After go-live, you will not notice major changes.

The risk associated with the mainframe will be mitigated.
PHASE 1 TIMELINE
(Phase 1: October 2012 – October 2013)

- **Discovery**
  - Oct-Nov 2012
  - Project Kick-off
  - Project Charter
  - Fit Gap Analysis

- **Configuration**
  - Jan 2013
  - Configuration Documented
  - Basic Conversions

- **Extensions**
  - Mar 2013
  - Workflow Development
  - Start Data Conversions
  - Start Data Validation

- **Adoptions**
  - Mar-Jun 2013
  - Complete Data Conversion & Validation
  - Develop Interfaces
  - Reports Development
  - System Integration Testing
  - User Acceptance Testing

- **Deployment**
  - Jun-Oct 2013
  - User Training
  - Security
  - Final Data Migration
  - Deployment
CURRENT FINANCIAL SYSTEM

Gateway eProcurement

GMC (Gateway Management Console)

BARC

Form-5 Check Request

Web-TEV Travel

ToF (Transfer of Funds)

ToE (Transfer of Expense)

FM Systems

The Mainframe

APEX

Financial Database

REX & POTS

FAMAS

ALLN01

CATS

Data Warehouse

EZ Access

Hyperion (Brio)

Online GL

UCOP
POST PHASE 1 FINANCIAL SYSTEM
## SYSTEM TRANSITIONS

<table>
<thead>
<tr>
<th>Current System</th>
<th>Post Phase 1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CORE FINANCIAL SYSTEMS</strong></td>
<td></td>
</tr>
<tr>
<td>Mainframe</td>
<td>PeopleSoft Financials</td>
</tr>
<tr>
<td>Rex (Com-Plete)</td>
<td>Gateway (SciQuest)</td>
</tr>
<tr>
<td>POTS (Com-Plete)</td>
<td>Gateway (SciQuest)</td>
</tr>
<tr>
<td>APEX AP Queries (Com-Plete)</td>
<td>Data Warehouse AP Queries</td>
</tr>
<tr>
<td>Gateway (SciQuest)</td>
<td>Continues</td>
</tr>
<tr>
<td>FlexCard</td>
<td>Continues</td>
</tr>
<tr>
<td>Travel</td>
<td>Continues</td>
</tr>
<tr>
<td>Transfer of Expense (TOE)</td>
<td>Continues</td>
</tr>
<tr>
<td>Transfer of Funds (TOF)</td>
<td>Continues</td>
</tr>
<tr>
<td>Check-Requests (Form-5)</td>
<td>Continues</td>
</tr>
</tbody>
</table>
# SYSTEM TRANSITIONS

<table>
<thead>
<tr>
<th>Current System</th>
<th>Post Phase 1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DEPARTMENTAL SYSTEMS</strong></td>
<td></td>
</tr>
<tr>
<td>Grand Unified System (GUS)</td>
<td>Continues</td>
</tr>
<tr>
<td>Recharge Files</td>
<td>Continues</td>
</tr>
<tr>
<td><strong>CAMPUS ACCESS</strong></td>
<td></td>
</tr>
<tr>
<td>EzAccess</td>
<td>Continues</td>
</tr>
<tr>
<td>Online G/L</td>
<td>Continues</td>
</tr>
<tr>
<td>Hyperion (Brio)</td>
<td>Continues</td>
</tr>
<tr>
<td><strong>AUTHORIZATIONs</strong></td>
<td></td>
</tr>
<tr>
<td>ALLN01 (Com=Iplete)</td>
<td>Gateway Management Console (GMC)</td>
</tr>
</tbody>
</table>
COMMENTS
AND
QUESTIONS