Looking Forward to the Mosaic HR Implementation

Financial Forum
April 22, 2014
Agenda

- Welcome and Project Overview
- HR Modules
- Timelines
- Testing
- Workflow
- Super Users
- Change Impacts
- Training
- End User Validation
- Question Period
Welcome & Overview

Welcome

Mosaic has two intertwined, yet distinct objectives:

1. Improve the way the university operates (modernize business processes).

2. Replace the computer systems that are used to operate much of the university with an enterprise resource planning (ERP) system.
Recap of HR Modules

The path to October 2014...and beyond
Recap of Mosaic landscape for HR

- The following modules are in-scope for HR Phase One:

<table>
<thead>
<tr>
<th>October 14, 2014</th>
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**Stream 1:**

- **Core HR** – Personal Information, Job Data, Compensation
- **Payroll** – Payroll Processing, Taxes, Pay cheque
- **Benefits** - Life, Major Medical, Dental, Pension, Pensionable salary calculation
- **Time Management** - Time Entry, Time approval, Leave tracking
- **Health & Safety** - Incident tracking
- **Training Administration** – Course enrollment, course tracking

**Stream 2:**

- **Recruitment** – Job posting, applicant tracking, offers, hire
- **Employee Self Service** – View personal info, view pay cheque, enroll in training
- **Manager Self Service** – Recruitment process, time approval, reporting
- **Workflow** – Time approval, recruitment approvals
Recap of Mosaic landscape for HR

- The following modules are in-scope for HR:

<table>
<thead>
<tr>
<th>October 14, 2015</th>
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<tbody>
<tr>
<td><strong>Pension</strong> – There will be an Interface between PeopleSoft and our third-party pension provider. The external service provider’s pension system will assist in certain administrative duties (tracking contributions, tracking pensionable earnings, running service accrual), as well as providing pension calculations and estimates</td>
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<table>
<thead>
<tr>
<th>January 5, 2015</th>
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<tbody>
<tr>
<td><strong>Succession Planning</strong> – Setting up Key Positions, Succession reporting</td>
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<td><strong>ePerformance</strong> – Performance forms on line, workflow, Employee &amp; Manager Access</td>
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<td><strong>Employee Self-Service (Full)</strong> – Update access</td>
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<td><strong>Manager Self-Service (Full)</strong> – Enhanced access to their employees information</td>
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<td><strong>Workflow</strong> – Enhanced approval workflow for manager self service</td>
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<td><strong>Pension</strong> – Self Service</td>
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## HR Phase 1: October 14, 2014

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- **System Testing** started in Mar 2014 and concluded in Aug 2014.
- **Parallel Payroll Testing** started in Oct 2014 and concluded in Nov 2014.
- **Cutover** occurred in Feb 2015.
- **Sustainment** occurred in Mar 2016.
# HR Phase 2: January 5, 2014

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HR Testing

Unit Testing
• Unit testing is completed on all changes to the vanilla application.
  – (RICE) Reports, Interfaces, Conversions, Enhancements

Conversion Testing
• All programming related to conversions, Data accuracy, Data Cleanup plans

System Integration Testing – Project Team
• All Reports, Enhancements and Interfaces tested
• End to End process testing
• Security roles and row level data
HR Testing

User Acceptance Testing – Business Owners

The final testing stages by users of a new or changed information system. If successful, it signals the approval to implement the system live.

- Business users test all Reports, Enhancements and Interfaces
- End to End process testing

Parallel Testing – Business Owners and Project Team

To test that payroll results balance to and within an acceptable margin of accuracy

- Dual input into both systems
- Pay is processed in both legacy and PeopleSoft
- Pay amounts are compared and reconciled
Workflow – PeopleSoft Human Resources

• HR uses a Position-based structure
  – Individuals are linked to positions
  – PS HCM workflow recognizes people may hold multiple positions concurrently

• Standard HR Approval Framework routing options include:
  – “Reports to” supervisor
  – Department manager
  – Role-based user lists
    • E.g.: HR central administrator; Recruiter
  – Delegation

HR Transactions are routed to the specific ‘reports to’ and/or ‘department manager’ of the position for which the transaction applies
Super Users Activities

HR FUNCTIONAL ACTIVITIES
- System Testing
- User Acceptance Testing
- Payroll Parallel Testing

CHANGE MANAGEMENT ACTIVITIES
- “What’s Changing” (Change Impact) Workshops

TRAINING ACTIVITIES
- Curriculum and Outline Review
- Training Material Development and Review
- Train-the-Trainer
- Training Delivery
- Training Evaluation and Reporting

GO-LIVE SUPPORT AND SUSTAINMENT
- Go-Live Support
- “Ask a friend” Support
- Sustainment

MOSAIC SUPER USER COMMUNITY
HR “What’s Changing” Sessions

- The HR “What’s Changing” workshops ran from March 20 to April 4, 2014
- 10 sessions held to date
- All impacts were captured and documented in the master change impacts tracker

Common themes:
✓ Changes required in how we think about what we do
✓ Automated processes (reduced manual entry)
✓ Greater access to information (e.g., tax slips)
✓ Reduced duplication and improved data quality (e.g., hire process)
✓ New terminology, definitions and concepts (e.g., salary, hourly, exception hourly; POI)
✓ Simplified processes (e.g., time entry)
✓ Decreased need for shadow systems (e.g., overtime tracking)

Summary of Impacts Captured:

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<td>M (Medium)</td>
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<td>L (Low)</td>
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Questions, Decisions, Take-Aways:
- 88 – Questions
- 18 – Outstanding decisions
- 30 – Take aways

Next steps:
- OCM will theme the findings
- Review with Functional Team
- Share with Super User Community
- Monitor documented impacts / actions
What’s Changing - Person ID

Current State – Legacy Systems

• MACVIP assigns employee numbers
• Student Information System assigns students numbers

Final State - PeopleSoft – October 14

• One ID will be assigned to a person
• Length: 9 chars (zero padded to 9 during conversion)
• Employee IDs utilized in the Finance application will originate from HR
• People who are currently an employee and student will have one ID set conversion
• The other id will be stored as the ‘Alternate ID’ in PeopleSoft
• Lookup ability to search on the Alternate ID
What’s Changing - POI

“Person of Interest” (POI) Concept

Q: What are POI’s?
A: POI’s are people who do not make up a part of the workforce but who are still of interest to the organization. (PeopleSoft definition)
“Person of Interest” (POI) Concept

McMaster will consider the following people POI’s in the MOSAIC HR system:

1. Students
2. Faculty Other Appointments (i.e. Part-Time unpaid faculty)
3. Outside Paid faculty
4. Visitors (If they require Health & Safety training or MacID access)
5. Contractors (If they require Health & Safety training or MacID access)
6. Spouse Survivors
7. Volunteers (If they require Health & Safety training or MacID access)

Impact: Larger volume of individuals in the system.

Student POI’s – Biographical information will be synched with MOSAIC Student system.
### What’s Changing – Pay Advice On-line

**Payroll - Pay Advice**

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What’s Changing – Time Management

Time Management

• Employees can enter their own time on-line
• Load Time from Third Party Systems
• Manage Compensatory Time Plans
  – Banking Overtime, Flex time, Payouts
• Approve Reported Time - ‘Reports to’ Supervisor
• Leave Types within Time Management (Vacation, Sick, Bereavement, etc.)
• Leave Requests ESS & MSS
• View Absence Balances ESS and MSS
What’s Changing – Debit Pay

Debit Pay

• Two new ways for employees to cover their personal Benefit contributions during unpaid periods.
• Can be used by any type of employee
• Employees can initiate either one; neither is mandatory
• No need for post-dated cheques
Mosaic HR Training

Assessment & Strategy
- Audience Analysis
- Training Needs Assessment
- Infrastructure Assessment
- Training Strategy
- Training Plan

Design
- Course Curriculum
- Course Outline

Develop
- Course Material
- Train the Trainer

Implement
- Class Schedule and Participant Registration
- Deliver Training

Evaluate
- Measure Effectiveness and Improve

Timeline:
- November 2013
- January 2014
- March 2014
- May 2014
End User Validation

- End user validation informs the roles needed to provide security access in the new system for Mac employees and to identify training requirements
- The OCM and HR team is taking a three step approach to validation:
  1. Define requirements with team members
  2. Communicate the need and importance of the process, followed by the requirements
  3. Gather completed validation forms from verifiers, and deliver to security

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<tr>
<th>Responsibility</th>
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<th>May</th>
<th>June</th>
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<td>Security</td>
<td>Provide PS roles</td>
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<td>HR</td>
<td>Map of PS roles to MacVIP roles</td>
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<td>Conduct roadshow</td>
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Validation / Security
- how we determine who needs access and training

• End user validation informs the roles needed to provide security access in the new system for Mac employees and to identify training requirements

Define requirements with team members
• Book meeting with key stakeholders (e.g., Security, HR Functional Leads, HR Chair, Learning Hub, Communications, and OCM including the Training Lead) to discuss requirements, roles and responsibilities in the validation process

Communicate the need and importance of the process, followed by the requirements
• Communicate using a staged approach the importance of validating role assignments in PeopleSoft
• Provide specific instructions on how to complete the document / form
• Arrange and hold meetings to walk through the process and confirm understanding

Gather completed validation forms from verifiers
• Arrange working sessions or interviews where required
• Collect completed validation forms with role information
• Input into the master tracking document
• Share list with Security
Question Period ?