

HR Off-Boarding Automated Process

Kem Marcum

ITSS – EIS Application Development Director

- Off-Boarding Overview
- Deliverables
- Development Approach
- High Level Timeline and Milestones

What is Off-Boarding?

- Steps needed to end employment for any reason: resignation, retirement, involuntary termination
- Off-Boarding ensures that email, electronic access, property and materials, parking, payroll and personnel records are properly managed

What is Off-Boarding?

- Representatives of Human Resources, Business Process Improvement and ITSS have collaborated to revise off-boarding procedures and to create an easy-to-use online process that incorporates the ePar (electronic personnel action request) and other forms
- We expect that this new online process will significantly reduce the time for Off-Boarding from the current average of 20 days
- Developed as a PeopleSoft Bolt-on

- Standardizes off-boarding
- Tracks and documents separation, generates ePar
- Supports dispensation of equipment and property with online checklists
- Improves timeliness of approvals
- Reduces risk

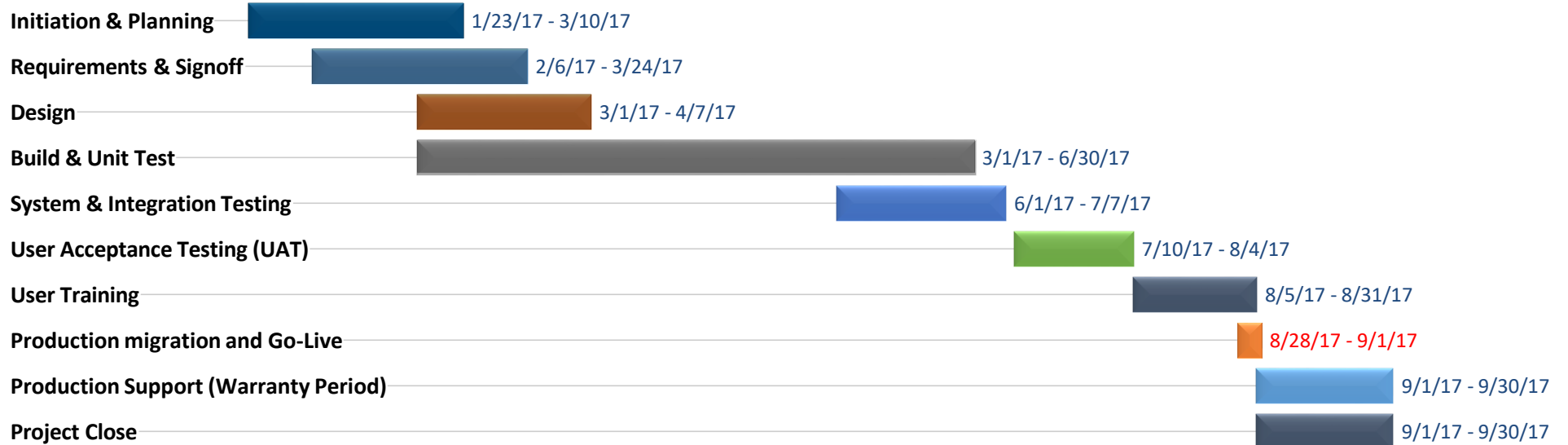
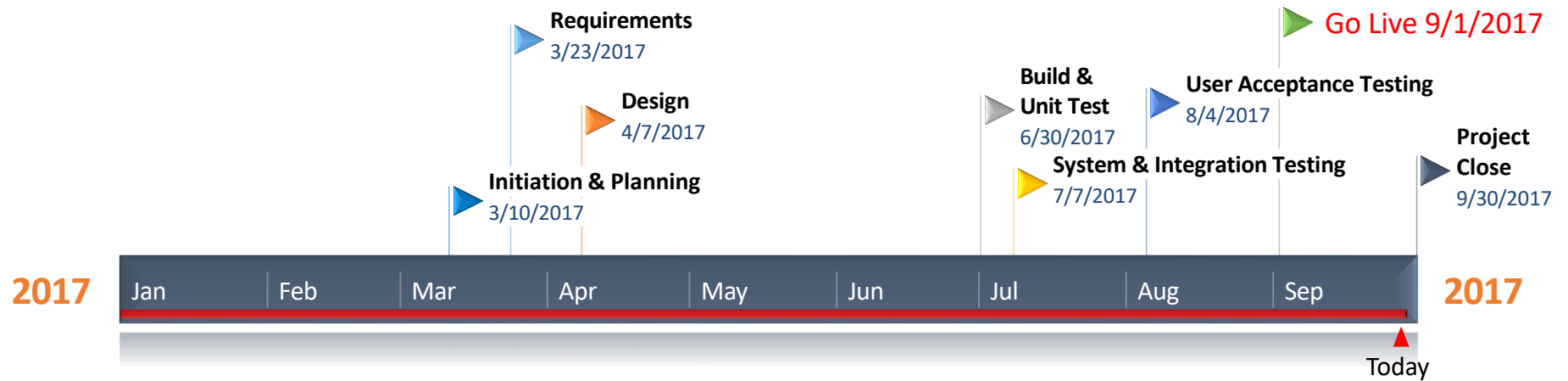
- Faculty or staff is leaving employment in all system components by retirement, resignation, involuntary termination
- Can be initiated by employee, department administrator, manager
- An Admin/Manager can initiate a voluntary retirement or resignation, or an involuntary termination

- Ability for Employee or Manager/Supervisor/Admin to initiate termination through Portal
 - ✓ Send e-mail confirmation to Employee & Supervisor/Manager when Employee initiates the termination
 - ✓ Send e-mail confirmation to Supervisor/Manager when Supervisor/Manager/Admin initiate the termination
- Online Employee Checklist (Dynamic)
 - ✓ Ability for Employee to complete checklist (Online)
 - ✓ Ability for Supervisor/Manager to review and approve a completed Checklist online with WorkFlow
- Online Manager/Supervisor Checklist (Dynamic)
 - ✓ Ability for Manger to complete checklist (Online)

- Automate ePAR generation and submit
 - ✓ Pre-Populate ePAR information from Employee/Manager Termination form and automate generation and submission of ePAR request
- Trigger automatic e-mail notifications to specified areas to take specific actions per a checklist on ePAR Approval. *(i.e. HR, Employee's Manager, ITSS/ACE, Purchasing Card, Travel Card etc..)*
- Reports
 - ✓ Generate month-end report for HR management to track terminations and monitor progress

- Sits in the PeopleSoft environment, alongside PS delivered modules
- Written in PeopleCode, a language provide by PeopleSoft in order to develop bolt-ons
- Leverages the reliability & availability of the PeopleSoft environment
- Leverages the security of PeopleSoft
- Same user interface, navigation, menus – same look & feel
- Can reuse PeopleSoft objects - Workflow, text catalog, component interfaces
- Can easily access PeopleSoft data
- New data tables can be created for the bolt-on, these sit beside the delivered PS data tables

High Level Timeline



Estimated Project Hours

ROM Total Hours: 1,009
ROM Project Size: Large

	Phase Hours	Business Analyst	Developer	Project Manager
Planning	95	24	14	58
Requirements	122	94	19	9
Design	122	48	65	9
Development	325	53	264	9
System Testing	122	75	38	9
UAT	128	91	23	14
Migration & Closure	95	27	54	14
Total	1,009	412	476	121

Actual hours spent: 982

User Effort in Hours
17
77
19
39
17
80
12
260

ITSS Application Overview

Finance

Core Finance

- General Ledger
- Accounts Payable
- Purchasing
- eProcurement
- Asset Mgt
- Commitment Control
- Expenses

ABA Budget Requests

- Hyperion Planning
- Concur

- eSupplier

Grants

- Grants
- Project Costing
- Contracts
- Billing
- Receivables

Effort Reporting

- Cayuse
- Ideate

- Cash Mgt
- eSettlements

Student

Campus Solutions

- Student Records
- Admissions
- Academic Advising
- Student Finance
- Financial Aid
- Campus Community

Clinical Rotation Coordinating Board Rptng
 Online Admissions Apps
 External Admission Apps
 Early Alert Retention
 Meningitis Notify
 Student Financial Obligations

- Admissions Lab
- Blackboard Learn
- Canvas
- CoursEval
- ePortfolio
- Faculty Profile
- GradesFirst
- Advising HigherOne
- Nelnet
- New Innovations
- Respondus
- RightNow
- RoboReg
- Ruffalo Noel Levitz
- SPOT course evaluation
- Sunopsis
- TerraDotta
- TK20
- Turnitin
- uAchieve Suite
- Visual schedules
- Wimba

HR

Core HR

- Employee Self Service
- Manager Self Service
- Benefits
- Compensation
- Workforce Admin

ePerformance

- Learning Mgt
- Talent Acquisition

PeopleAdmin

Payroll

- Payroll
- Time & Labor
- Commitment Accounting

eLeave
 ePAR
 Web Clock
 Employee On-boarding
 Off-boarding

CRM

SalesForce

- Sales Cloud
- Marketing Cloud
- Service Cloud
- TargetX
- QAS Address Clensing
- Social Studio

Administrative

- AdAstra
- Blackbaud Raisers Edge
- Clockwork
- Dining Services
- Facilities
- FMLA Source
- HSC Health Clinics
- ID Cards
- Libraries
- Parking & Garage Ops
- Qualtrix
- Radiant Virtual Asset Tracking
- Rec Center
- RMS Housing
- Space Mgt & Planning
- Tango – ACA
- Telecom
- The Work Number

ACES Security

Legend

PeopleSoft

Purchased Software

PS Not Owned

PS Bolt-on

PS Owned Not Implemented

Custom Software

Reporting, Analytics & Document Mgt

Blackboard Analytics

Cognos / Data Warehouse

Image Now

Online Access

Portal



Thank you for your time!