

# PeopleSoft Assessment, Training, Optimization

Huron Consulting Group

March 8<sup>th</sup>, 2022



# Agenda

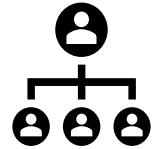
- PeopleSoft Phase II Assessment
- Assessment Findings Summary
- Implementation Roadmap
- Training Updates
- Optimization Effort & Next Steps
- Q&A



# PeopleSoft Phase II Assessment (September 2021)



# Assessment Findings Summary

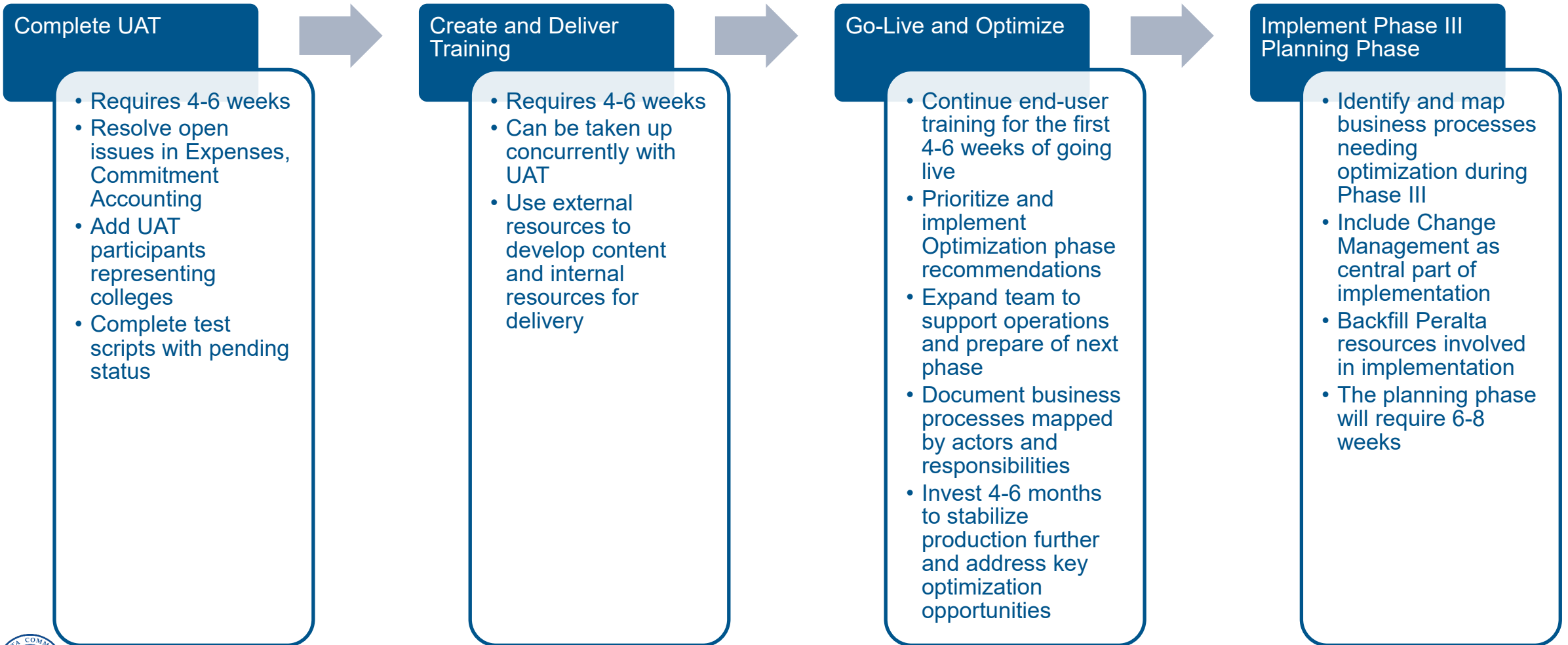


- A lot of hard work from the district's teams from IT and business offices have brought the implementation close to the finish line and must be recognized
- Phase II functionality is helping PCCD meet its strategic goal of reducing paper and streamlining business processes while reducing customizations to the delivered application
- Preparation for end-user training is stalled due to lack of resources to create and deliver content
- Change Management has not been a focal point of the implementation, resulting in nominal stakeholder involvement from colleges
- Team members responsible for the implementation have also been maintaining operations
- Although the User-Acceptance Testing of the PeopleSoft functionality is almost complete, lack of involvement from colleges may result in adoption challenges
- Finance and HR teams have not had enough opportunity to optimize business processes during the implementation, resulting in inefficiencies such as approval redundancies
- Future State Business Processes are not mapped by actors and responsibilities, leading to uncertainty and potential inconsistency in performing critical functions post go-live



# Implementation Roadmap

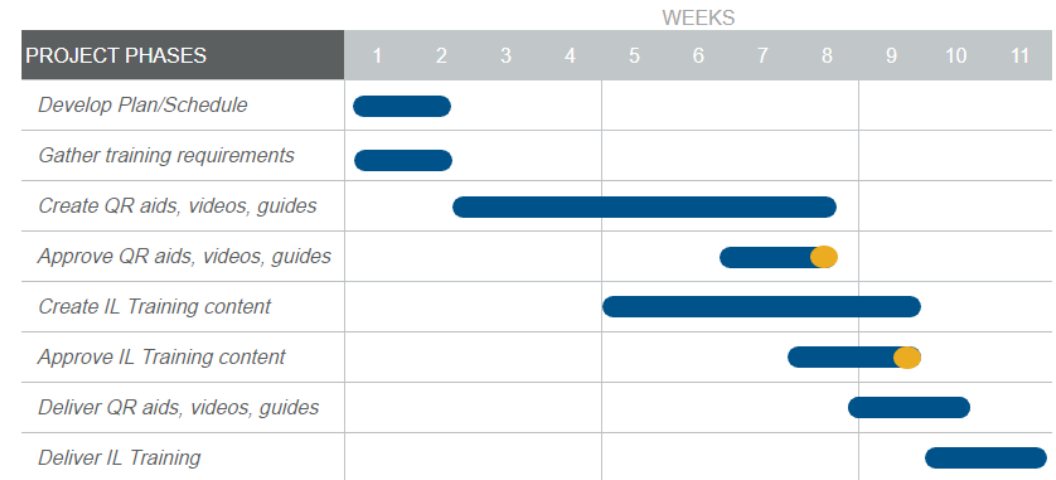
## Next Steps for Assessment Recommendations



# Training Update

End-user training for HCM and Finance as part of Phase II

- Peralta and Huron teams have started working on development of training instructor-led classes, Quick-reference videos and Job-aids
- Over 20 Quick Reference Guides have been developed
- Training schedule and training plan will go out for approval this week
- This training will cover areas such as Time Entry, Self-Service eForms, Travel & Expense Entry and Approval, etc.
- Instructor-led classes will take place in the month of April to enable use of the new PeopleSoft functionality



# Optimization Effort and Next Steps

## Functional Support and Business Process Advisory Needs

- PCCD has requested Huron's assistance to help resolve issues related to optimizing business processes that have already been implemented as part of the recent PeopleSoft 9.2 implementation, as well as those related to the currently implemented Phase II
- Huron will provide up to 200 hours of advisory support to help with the following areas:
  - Student Billing
  - Financial-Aid Compliance and Efficiency
    - Pell and Student Loan Reconciliation\*
  - General Ledger Monthly Process Reconciliation
- Refining and optimizing processes is a continuous improvement journey for operations.

*\*Contract forthcoming: based at Laney (as the largest campus) to address specific issues with reconciliation and related areas. Resolution to issue will positively impact current district processes across all campuses.*



# Q&A

