Peralta CCD
PeopleSoft Upgrade Phase II
November 9, 2021

Peralta Community College District

Presenters

Antoine Mehouelley
Chief Technology & Information System
Officer

Marla Williams-Powell
Executive Director of Fiscal Services

Immaculate Adesida
Director of Human Resources

Peralta Technology Modernization: PeopleSoft Upgrade Project Charter

Executive Sponsor:
Chancellor Jannett Jackson
jjackson@peralta.edu

Executive Advisors:

Angelica Garcia-Berkeley City College
angelicagarcia@peralta.edu

Nathaniel Jones III- College of Alameda
nathanieljones@peralta.edu

Rudy Besikof -Laney College
rbesikof@peralta.edu

David M. Johnson - Merritt College
dmjohnson@peralta.edu

Executive Advisors:

CTO Antoine Mehouelley amehouelley@peralta.edu

VC Ronald McKinley rmckinley@peralta.edu

VC Adil Ahmed aahmed@peralta.edu

VC Siri Brown sbrown@peralta.edu

Steering Committee Chair:
CTO Antoine Mehouelley

Peralta PeopleSoft 9.2 Functional & Technical Team:

VC Ronald McKinley
Human Resources
rmckinley@peralta.edu
Human Resources

- **Workforce Administration**
- **Payroll**
- **Benefits**

- Khang Ho – HR System Analyst
  kho@peralta.edu
- Ruby L Andrews – HR Analyst
  rlandrews@peralta.edu
- Harizon Odembo – Benefits Manager
  hodembo@peralta.edu
- Alejandra Rodriguez – HR Generalist
  alejandrarodriguez@peralta.edu
- Teri Antonio- Enterprise Analyst
  tantornio@peralta.edu

VC Adil Ahmed
Finance
aahmed@peralta.edu
Finance Modules

- **Purchasing:**
- **Accounts Payable:**
- **Commitment Control:**
- **General Ledger:**
- **Asset Management**

- Finance Analyst -Vacant
- aahmed@peralta.edu
- Brian Slaughter – District Director of Purchasing
  bslaughter@peralta.edu
- Seraphine Nzomo - District- Sr. Buyer/Cap Projects-Bonds
  snzomo@peralta.edu
- Tami Taylor – District Senior Accountant
  tamitaylor@peralta.edu
- Nicholas Shere
  nshere@peralta.edu
- Andrea Stokes - District- Capital Projects Coordinator, Finance
  astokes@peralta.edu
- Vu Nguyen
  vnguyen@peralta.edu
- Herzie Mendoza
  hmendoza@peralta.edu
- Rebecca Del Toro – Payroll Director
  rdeltoro@peralta.edu
- Michelle Lenh – Payroll Coordinator
  mlenh@peralta.edu
- Dominique Love – Payroll Specialist
  dolove@peralta.edu

VC Siri Brown
Campus Solutions
sbrown@peralta.edu
Campus Solutions

- **Admissions & Records**
- **Academic Advisement**
- **Student Financials**
- **Financial Aid**
- **Academic Structure**
- **Curriculum Management**

- Silvia Cortez (District) - A&R Systems Analyst
  scortez@peralta.edu
- Dominique Taylor (District) – Coordinator Admissions and Records/Transcripts
  dtaylor@peralta.edu
- Joyce Brown Willis (District) Student Financial Applications System Analyst
  jwillis@peralta.edu
- Vu Nguyen (District) System Analyst Payroll/Finance
  vnguyen@peralta.edu
- Abigail Angel Umale (District) – Financial Aid Systems Tech Analyst
  aumale@peralta.edu
- Amany ElMasry - Curriculum and Systems Technology Analyst, Academic Affairs
  aemasry@peralta.edu

DIR Antoine Mehouelley
Technology
amehouelley@peralta.edu
Information Technology

- **Application**
- **Network**
- **System Integrations**

- Teresa Chang - Sr. PeopleSoft Database Administrator
  tchang@peralta.edu
- Chiranjeevi Adusumalli- Sr. Applications Software A.
  cadusumalli@peralta.edu
- Jonathan Olkowski - Sr. Network Systems Administrator
  jolkowski@peralta.edu
- Chi Au - Sr. Network Systems Administrator
  chiau@peralta.edu

Peralta Technology Modernization PeopleSoft 9.2Upgrade :

Governance Committee Chair
Chief of Staff Royl Roberts
rlroberts@peralta.edu

Participatory Governance

Training and Communications
- Mark Johnson markjohnson@peralta.edu
  - Inger Stark istark@peralta.edu
    - Brielle Plump bplump@peralta.edu

Student Tutorial-
https://web.peralta.edu/admissions/video-tutorials-for-student-campus-solutions/

Faculty Tutorial
https://peralta.instructure.com/courses/41699

Student Focus Group
- **Chrys Yap:** 10996950@cc.peralta.edu
- Mingshi Son: mingshisong01@gmail.com
- Daniel Bui: dbui2023@gmail.com
- Mingshi Song: mingshisong01@gmail.com
- Landen Manuel: landenamanuel@gmail.com
- Bruna Warner: brunagallo89@gmail.com
- Jasmine Bledsoe: bledsoejasmine17@gmail.com
- Armando B. Villa: armandovilla510@gmail.com
- Sabria Hinton: sabriahinton19@gmail.com
- Emily Li: emilyli314@yahoo.com
- Cora Moss: coraleigh.moss@gmail.com
- Ana Touriel: ana.g.touriel@gmail.com
- Clarissa Del Viscoc.lopez.delvisco@gmail.com
- Ethan Casana : ecasana@ucsc.edu

Governance Committee DTC/DAS
- Jennifer Shanoski jshanoski@peralta.edu
- Donald Moore donaldmoore@peralta.edu
- Rupinder Bhatia rbhatia@peralta.edu

PeopleSoft Upgrade 9.2 Phase II Business Process Modernization

New Modules

- Manager Self-Service
- Position Management
- Time and Labor
- Commitment Accounting

Human Capital Management (HCM) Pillar

Phase Two Scope | Peralta CCD |

Peralta Community College District

Project Goal

Utilize District Resources effectively and efficiently

1 Replace PCCD custom built electronic personnel action form (ePAF) with PeopleSoft Manager Self Service.

2 Convert paper base leave action report form (LAR for full time employees) into employee electronic submission and electronic manager approval.

3 Convert paper timesheet form (for hourly and part time employees) into employee electronic submission and electronic manager approval.

Replace ePAF with PeopleSoft Manager Self Service

eFORMS for various types will be created and will be available for Managers to initiate electronic personnel actions, e.g., hire, job data change, promotion, etc.

Manager Self Service tile will be created in one place to make it easier for the manager to perform his/her task, e.g., initiate request, approve request, approve time submitted, etc.

Approval will be streamlined and managers will have the ability to appoint a delegate during their absence.

Managers will have the ability to view and manage their employee's available sick, vacation and floating holiday leave hours if applicable.

Employees will have the ability to electronically submit Leave Absence Report (LAR for full time employees) via Employee Self Service (ESS).

Employees will have the ability to view their sick, vacation and floating holiday hours on the same page where time is to be submitted.

Convert paper base LAR into electronic employee time submission.

Student workers and hourly employees will have the ability to electronically submit *timesheet* hours and/or stipend request via Employee Self Service (ESS).

Student workers and hourly employees will have the ability to view their sick hours from the same page where time is submitted.

Convert paper form approval for LAR and Timesheet into electronic manager time approval.

Managers will have the ability to electronically approve Leave Absence Report (LAR) submitted by the employee by going to Manager Self Service (MSS) tile.

Managers will have the ability to electronically approve Timesheet related hours and/or stipends submitted by student workers and hourly employees.

Speeds up the time in processing LAR absences; No need to submit paper LAR to benefits department

Speeds up the time in processing Timesheet hours and stipends. No need to submit paper timesheet to payroll department.

Employee Training

Employee Self Service Timesheet & LAR Electronic Submission

Employee Self Service Action Request Electronic Submission

Notification

Automated email notification will be sent to **EMPLOYEEs** to electronically submit timesheets.

Automated email notification will be sent to **MANAGERs** to approve timesheets electronically submitted by their direct employees.

Peralta Community College District

HCM Project team allocated to this project:

- ➤ Human Resources
- ➤ Payroll Department
- ➤ Finance Staff
- ➤ Information Technology

Team Resources

Full collaboration and numerous work sessions are on-going between multiple departments to ensure the accuracy of business processes.

PeopleSoft Upgrade 9.2 Phase II Business Process Modernization

New Modules

- Asset Management
- Expense Management
- Supplier Contracts

Financial & Supply Chain Management (FSCM) Pillar
Phase Two Scope | Peralta CCD |

Peralta Community College District

Project Goal

Utilize District Resources effectively and efficiently

1 Asset Management module will be implemented to track all the assets greater than $5000 and provide the net book value to management

2 The Supplier Contract Management module provides a centralized contract clause library used for executing purchases, which allows the District to author, approve, manage documents and amendments, preserve legal documents and execute contracts via Adobe Sign between Suppliers and the District

3 Expense Management module will be implemented to replace manual process in administration and tracking of District's travel expenses

Asset Management module will be implemented to track assets greater than 5000$.

Asset Management module will record and store required asset information in our Oracle database.

Basic information will be tracked for each asset. This includes cost, quantity, in-service date, depreciation method, category, profiles, location, asset types, book, tag number serial ID, manufacturer, model number, etc.

Any asset more than $5,000 will be capitalized immediately and will have a corresponding asset tag.

Project Assets will be transferred to inventory after the completion of the project. These assets will then be considered as a "normal" asset thereafter.

Assets will be tagged in the PeopleSoft System with the implementation of this module.

Lease assets will be tracked.

Asset Physical inventory system features will be enabled and reports can be generated.

Implement Supplier Contract Module: replace Contract administration

Create contract - Only the Requisitioners who have the proper security can have access to create and submit contracts in the Oracle database.

Approve Contract- Only Approvers who have proper security can access and approve contracts

Create document

Create requisition and pre-encumber funds

Approve and sign documents – Submission will be done only after the requisition is created

Add contract ID to the requisition line

Approve and budget check the requisition

Run auto source to process the purchase order

Implement Expense Management Module: Replace Microsoft Word, Excel and Adobe Sign Manual administration & tracking of District's Expense.

Travel authorizations - Travel authorizations are used to pre-approve the not-to-exceed amount of travel costs.

Travel Advance - Requests will be submitted through the expense module

Expense reports - Expense reports are submitted after the travel to reconcile all the costs and advance against the travel authorizations.

We will no longer be using dummy vendor files for employees

Expenses can be classified and coded directly within the expense module

User and/or Requestor Training

User Training will be provided on how to use Asset Management module.

User Training will be provided on how to submit travel and expense using Expense module.

User Training will be provided on how to request/create contract using Supplier Contract module.

Approver Training

Approver Training will be provided on how to make approvals using Asset Management module.

Approver Training will be provided on how to make approvals using Expense module.

Approver Training will be provided on how to make approvals using Supplier Contract module.

AWE Notification

Automated Workflow Electronic Notification will be sent for any transactions that requires action.

Notification will appear in employee's PCCD email

FSCM Project team allocated to this project:

- ➢ Purchasing
- ➢ Accounts Payable
- ➢ Finance Staff
- ➢ Campus Users
- ➢ Information Technology

Team Resources

Full collaboration and numerous work sessions are on-going between multiple departments to ensure the accuracy of business processes.

Peralta Technology Modernization: PeopleSoft 9.2 Upgrade

Addressing Current Challenges as of 11/03/2021

- Constraints:

  - Additional resources needed to accomplish District wide training and deployment.

  - Diminished Staff Capacity & Bandwidth - impacting project progress.

  - HURON Consulting Group's assessment needs to be considered and achieved

- Addressing Constraints

  - Reassessed Current deployment plan: too aggressive and timeline needs adjusting, Training Considerations and Full Assessment Completion based on Huron's Assessment

- Solution *Modified Go-live Date March 31, 2022*. *RFP needed for external training Extended*

Peralta Community College District

Questions?

Peralta Community College District

Thank You!

Peralta Community College District