Agenda

- User Experience Demonstration
- HCM Program Baseline
- Organizational Design
- Impactful Decisions
Jayne Smith (UGA) and Diane Kirkwood (SSC)

- Supports the tenure and promotion process.
- View faculty data in one location.
  - Includes additional posts and special titles.
- Tenure calendar.
- Give prior credit and extensions.
- Record CIP Teaching Code for each faculty member.
– Faculty contracts.

– Annual renewal notification.

– Part-time offer letter.

– Institution-specific promotion path for non-tenured faculty.
HCM Program Baseline

Project Decomposition
HCM Program Baseline

- Inventoried full HCM Functional Decomposition
- Executing Business Process and Compliance Review
- Tracking Deliverables via Dashboard/Scorecard
- Benefits Administration - Update
- Independent Cost Estimate/Measuring Value
- New Transition Strategy
- Define Research Institution Unique Requirements
- Incorporate Parallel Test Phase to Demonstrate Full Functionality

- Completed
- In Progress
- Pending
PeopleSoft v9.2
(ADP Replacement)
- Human Resources
- Position Management
- Time & Labor
- Absence Management
- Commitment Accounting
- Benefits Administration
- Payroll
- Employee Self-Service
- Manager Self-Service
- Hardware/Infrastructure
  (Reports, Interfaces, Conversions and Enhancements)

AON Benefits Administration
- Equifax / Affordable Care Act Compliance
  (Replacement Service)
- Financials Integration
  (GeorgiaFIRST)
- HR Data Mart / Warehouse
- Aon / Retiree Exchange
- Policies
- Security Permissions & Workflow
- Business Procedures
- Training Job Aids & Communications
- Application Support Organization
- Service Level Agreements & ServiceNow Implementation
- Business Process & Compliance Review

ADP Garnishments
(Replacement Service)
- ADP Tax Filing
  (Replacement Service)
- Wells Fargo Banking Services
  (Replacement Service)

Kaba Time Clocks
(Replacement Service)

Financials Integration
(GeorgiaFIRST)

Equifax / Affordable Care Act Compliance
(Replacement Service)

Completed
In Progress
Decision Impact
HCM Program Baseline

Business Process & Compliance Review
HCM Project Baseline: Business Process & Compliance Review

Core Implementation Sign-Off Deliverables

- June: Design Team (Module & Cross Functional)
- July: HR & Financials Steering Committees
- August: System Office MDA & Advisors

Controlled Requirements Baseline
Implement Change Review
HCM Project Baseline:
Business Process and Compliance Review

Accomplishments

– Design Team review sessions complete.
– Augusta University 2 ½-day workshop complete.
– Binder revisions complete and submitted to Steering Committee.
– System configuration documented.
– R1 requirements topics identified.
– Steering Committee Review completed July 26-27.

Next Steps

– Georgia Tech Commitment Accounting Workshop - Aug. 23
– Cross Functional Reviews
  • TBD in Athens
  • September 14 at Georgia Summit
– Program Review with University System Office - TBD

By the Numbers

• Business processes documented: 325
• Use cases: 1,481
• Test conditions: 3,544
• Binder metrics:
  • Binders: 18
  • Pages: 2,163
• Workshop metrics:
  • Participants: 239
  • Delivery days: 16
HCM Program Baseline

Tracking Deliverables & Scorecards
HCM Project Baseline: Core Dashboard / Scorecard

System Test Conditions

- April 2016: 1652 (Not Started), 505 (Defects), 58 (Passed)
- May 2016: 3001 (Not Started)
- June 2016: 3448 (Passed)
- July 2016: 3448 (Passed)
- August 2016: 3544 (Passed)

Controlled Requirements Baseline
Technical Team Development Update

HCM Development
Number of Tasks Complete/Incomplete

<table>
<thead>
<tr>
<th>Category</th>
<th>Complete</th>
<th>Incomplete</th>
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<td>Commitment Accounting</td>
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<td>Employment Self Service</td>
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<td>GeorgiaFIRST</td>
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<td>Time and Labor</td>
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<tr>
<td>Total</td>
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HCM Project Baseline: Core Dashboard / Scorecard

Training Job Aids

- April 2016: 62, 20
- May 2016: 67, 15
- June 2016: 72, 26
- July 2016: 78, 17
- August 2016: 82, 13

+6 Completed
ITS Staffing Update

Consulting Costs OneUSG, January - June, 2016

Total Consulting Costs
6 months ending June 2016 = $2,771,000
HCM Program Baseline

Benefits Administration - Update
Aon Hewitt was selected as benefits administration vendor. Contract has been executed by piggybacking on State’s contract with Aon Hewitt.

Plan is for implementation to be completed by April 1, 2017 for all institutions.

Immediate priorities:
- Technology approach with HCM interfaces; current discussions and analysis in progress with the OneUSG team.
- Integrating benefits administration system implementation schedule with overall OneUSG project schedule.
- Scheduling meetings with R1s to discuss scope and resource needs. Separate implementation kickoff meetings will be held with R1s in latter part of August.

Does not impact USG benefit plan offerings.
HCM Program Baseline

Independent Cost Estimate/
Measuring Value
<table>
<thead>
<tr>
<th>Metric</th>
<th>Module</th>
<th>Back Office Leading Indicator</th>
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</table>
| Tax Amendments Processed                   | ADP - Taxes                                 | 1. Payroll Processing Issues  
                                                                                                      |
| Benefits Haste Enrollments                 | Benefits Administration                      | 1. Life Event or Open Enrollment Issues  
                                                                                                      |
| SSC Contacts Benefit Provider to Initiate Coverage | Benefits Administration                      | 2. Benefit Provider Interface Issues  
                                                                                                      |
| Employees Not Paid by Direct Deposit       | Employee Self-Service                        | 3. Benefits Reconciliation Discrepancies  
                                                                                                      |
| Average Approval Days                      | Manager Self-Service                         | 1. Increased Administrative Costs Associated with Check Printing  
                                                                                                      |
| Off Cycle Checks Issued                    | Payroll                                     | 2. Training & Change Management Gaps  
                                                                                                      |
| Checks Issued Outside of Normal Payroll Run| Payroll                                     | 3. Security / Delegation Issue  
                                                                                                      |
| Call Center Tickets Logged                 | ServiceNow/Service Level                    | 4. Lack of Buy-In from Management  
                                                                                                      |
| Average Days Call Center Ticket Open       | ServiceNow/Service Level                    | 1. User Dissatisfaction  
                                                                                                      |
| Unapproved Time or Leave                   | Time and Absence                            | 2. Shared Services & Institution Organizational Design  
                                                                                                      |
| Time or Leave Approved in Batch by SSC / Time Admin | Time and Absence                            | 1. Workflow Routing Issue  
                                                                                                      |
                                                                                                      |
|                                            |                                             | 3. Training & Change Management Gaps  
                                                                                                      |
HCM Program Baseline

Transition Strategy
• Key activities performed during strategic pause to establish program baseline.

• Business process and compliance review sessions completed.
Implementation Schedule

- **Jan Jun Nov 2017**
  - Start R1 Engagement
  - First Cohort (Apr'17)
  - AON

- **Sep 2018**
  - User Acceptance Testing
  - Second Cohort (Jul'17): Parallel Testing

- **Jul Dec 2019**
  - System Testing
  - Testing Cycle: 2nd Cohort

- **Oct 2020**
  - Testing Cycle: R1 First Cohort
  - Final Cohort (Jan'18)
  - Testing Cycle: R1 Second Cohort
  - Testing Cycle: R1 Third Cohort

- **Strategic Pause**
  - HR & Finance Steering Committee Review
  - Technical Development
  - Design Team Workshops
  - Functional Specification Completion

- **Exit Strategic Pause**
  - Go Live: USO
  - Testing Cycle: 3rd Cohort

- **Testing Cycle: 4th Cohort**
  - Third Cohort (Oct'17)
  - Fourth Cohort (Jan'18)

- **Steering Committee Review**
  - Program Review
  - Testing Cycle: R1 Second Cohort
  - R1 Second Cohort

- **AON**
  - First Cohort (Apr'17)
  - Start R1 Engagement
  -Testing Cycle: R1 First Cohort
HCM Program Baseline

R1 Requirements Gathering
Upcoming Engagements

• University of Georgia
  – July 28 – Planning Meeting
  – Core Team – TBD Last week of August – Requirements Session

• Augusta University
  – TBD – Planning Meeting
  – TBD – Requirements Session

• Georgia State University
  – Aug. 4 – Planning Meeting
  – TBD – Requirements Session

• Georgia Tech
  – Aug. 23 – Commitment Accounting
  – TBD – Planning meeting
  – TBD – Requirements Session
Organizational Design
• Core implementation deliverables provide input into the process of identifying the organizational requirements.

• Composition of ITS and SSC aligns with HCM Functional Decomposition.

• Recommended ITS organizational structure is completed.
  – ITS Application Support Team will mirror structures of existing Enterprise Managed Service areas.
  – Additional staffing (22) to support deployment activities and transitioning support.
  – ITS has reached out to Oracle on a recommended support structure (25).

• SSC organizational structure being defined to support new services.
  – Additional staffing (TBD) to support payroll, money movement, employment verification and benefits reconciliation.
  – SSC is engaging Accenture to assess capacity requirements.
Impactful Decisions
Decisions

1. Confirm faculty option for 10/12 month pay – **Approved**

2. Standardized calculation for 10-month faculty hourly rate – **Approved**

3. Select monthly pay frequency change approach – **Approved**

4. Reaffirm manager self-service and standardized approval hierarchies – **Approved**

5. Benefits administration key decision making – **Approved**