PeopleSoft 10-year Milestone Achievement

A REVIEW OF A STRATEGIC INSTITUTIONAL COLLABORATION EFFORT & THE FUTURE OF PEOPLESOFT AT PEPPERDINE UNIVERSITY

http://community.pepperdine.edu/it
At the end of the 2014 fiscal year, the University reached a major milestone in the PeopleSoft project. This 10-year project (formerly – Connections to Community) focused on migrating Pepperdine data into PeopleSoft. A team of data professionals along with key colleagues from all five Pepperdine schools and University administration, worked together to build a dynamic system that accurately stores and tracks the human resources, financial data, and enterprise operations of Pepperdine.

PeopleSoft has helped the University award more than $1.5 billion in Financial Aid; create more than 9 million financial journal entries; process more than 90,000 University applications; and created 33,000 separate employment instances.

This report celebrates the 10 years of collaboration it took to build this unique system and will highlight how it is key to helping us, the University, better focus on assisting our students pursue lives full of purpose, service and leadership.

PeopleSoft Changed How Pepperdine Does Business

This report will show how PeopleSoft has revolutionized the way the University handles reporting, compliance, and security issues; improved the user experience with user-friendly, self-service portals; and streamlined application processing, Financial Aid calculating, and welcoming new students.

You will hear from Pepperdine staff who use the system every day and how it has simplified their work. Lastly, this report will share the opportunities and challenges that are on the horizon for PeopleSoft and how Pepperdine leadership can preserve the integrity of the University’s data for years to come.
The 10-year PeopleSoft project was originally funded at $39 million. Information Technology (IT) actively looked for opportunities to limit costs and leverage existing investments. It is important to understand the original budget projections were prepared in 2002–2003.

In 2008, IT projected a total budget deficit of $4.7 million. Since then, IT – in consultation with University leaders – rescoped the total project budget and reduced the deficit by aggressively managing consulting costs and leveraging the strong development IT team here at Pepperdine. At the conclusion of the fiscal year 2014, the total budget deficit was $275,000. This equates to 0.7% over budget, which IT covered through its operational budget.
Prior to the migration to PeopleSoft, the University’s data existed in different systems. This made it difficult to quickly render reports on enrollment and retention rates. To bring these systems together, a common language and a rich framework was created to provide University decision-makers with the ability to easily generate reports from one place. A few examples of these reports are included below:

- **Quality Education**: In order to provide the best education for Pepperdine students and to increase student retention and graduation rates, Enterprise Information Systems (EIS) partnered with the Registrar’s Office to develop a method of tracking and identifying at-risk students in PeopleSoft.

- **Timely Reports**: EIS worked with key departments to greatly simplify the retrieval of reports. “The PeopleSoft HR module has greatly increased Human Resources’ ability to provide timely and accurate reports to University decision-makers regarding the composition and status of Pepperdine’s workforce.” - Carla Anderson, Associate Director of Compensation and Employment

---

**In PeopleSoft HR...**

- 418,000 Paychecks Processed
- 33,000 Employment Entries Created

**In PeopleSoft Finance...**

- 64,000 Purchase Orders Created & Paid
- 9 million Journal Lines Created
Automating Applications and Data Entry Tasks

PeopleSoft provides the opportunity to automate mundane tasks of Pepperdine staff. By leaving the data entry, application processing and tracking to the system, staff are able to concentrate on the more valuable aspects of their jobs.

- **Streamlining New Student Orientation (NSO):** The PeopleSoft team partnered with the Registrar’s Office to streamline the student registration process during NSO, making a student’s first introduction to Pepperdine as positive and enjoyable as possible.

- **Automating Faculty Contracts:** Pre-existing PeopleSoft data was incorporated into the contract creation process. “The ability to create and approve contracts electronically has greatly streamlined our faculty contract system. I worked in the day that I had to type every contract.” - Janet Davis, Executive Liaison, Seaver College

- **Calculating Financial Aid:** Having University data in a common framework that is reliable and secure allows staff to automate an immense number of tasks including calculating Financial Aid and tuition.

- **Providing Efficiencies for HR and Finance:** “PeopleSoft has transformed the way we do business at the University. In HR, Student, and Finance, we’re all working much more efficiently than we would have ever been able to using our old systems. We’re able to process more data while at the same time restricting growth in personnel costs. We’re all doing more, with more capability for reporting and analysis than we’ve ever had before, while doing it all with fewer or the same number of people than we had a decade ago. While not perfect, we’re able to see our operating data in ways that have truly empowered us to make better decisions. We’re much better equipped to make decisions informed by data, as well as business sense.” - Paul Lasiter, Vice President and Chief Financial Officer

- **Automating Routing of Documents:** The PeopleSoft team worked to automate a number of key processes, including requisitions, credit card substantiation, and expense reports.

We’re all working more efficiently than we would have ever been able to using our old systems.

- Paul Lasiter, Vice President and Chief Financial Officer
Adjusting to the Changing Legal Environment

The legal landscape has only grown more complicated over the past 10 years. Healthcare, NCAA and Financial Aid compliance are all potential risks for the University. The benefit of having University data in one place using a common format has made it easy for IT staff to quickly write customized code to ensure Pepperdine is always in legal compliance.

- **Ensuring Compliance:** PeopleSoft has allowed the University to quickly adapt to laws set in the Theft Protection Act of 2011 and the Affordable Care Act. Each of these new laws represents a key change in how the University does business.

- **NCAA Compliance:** The PeopleSoft team automated the task of creating an athlete’s progress toward degree report for Pepperdine Athletics. A once heavily manual process can now be done anytime and is available 24/7.

Self-Service

Providing a Better User Experience

The WaveNet Portal, which acts as the entry point into PeopleSoft, allows applicants, students, faculty, and staff to edit their own information, ensuring that the University has the most current information. Users can directly update grading and healthcare information, create contracts, and monitor their Financial Aid.

- **Student & Faculty Center:** In the Student Center, students have access to their progress toward a degree, class registration, grades, and Financial Aid. In fact, students have the ability to grant guest access, so that their parents can see what they see or to make a tuition payment. In the Faculty Center, faculty can also submit grades, track at-risk students, and perform academic advising online.
PEOPLESOF-T 10-YEAR ACHIEVEMENT

- **Employee Benefits**: University employees can now choose their benefit package from the comfort of their own computer. “The PeopleSoft Benefits modules has allowed us to implement online benefits enrollment for newly eligible employees and during open enrollment. This has freed up the benefit staff’s time that was previously required due to the manual input required of the previous HRIS system.” - Michelle del Giudice, Senior Associate Director, Human Resources

- **Increase Availability**: “The adoption of PeopleSoft has enabled the School of Public Policy to adapt to a 24/7 service model for students, staff and faculty: students can access a degree audit at 2:00 a.m. for decision-making needs for an 8:00 a.m. class registration; staff can be recruiting students in Asia, but still utilize the business intelligence for reporting by logging in and running a query for a presentation; and faculty can submit grades online from the convenience of their homes after business hours. In addition, the convenience and efficiency of the superior self-service options frees the staff to dedicate more time to nurturing and addressing student needs.” - Sheryl Covey, Assistant Dean for Administration, School of Public Policy

---

**In PeopleSoft Student...**

More than $1.5 billion Awarded in Financial Aid

More than 94,000 Applicants Processed

More than 25,000 Students Have Enrolled
The PeopleSoft Cloud-Hosting Project

Three years ago, the PeopleSoft team began to focus on upgrading the PeopleSoft application, which included a successful redesign of the WaveNet Portal in 2013. The years prior to that were spent modifying the system to meet the needs of the University at the expense of upgrading the system. To better manage our systems and get them on the current software versions, IT will be utilizing Oracle’s cloud service.

Oracle will provide the hosting of all our PeopleSoft environments, online data storage, 24/7 system monitoring and top-of-the-line security. The community should notice reduced downtime during maintenance and upgrades and faster response time for all systems.

This new phase in PeopleSoft, called The PeopleSoft Cloud-Hosting Project, will allow EIS staff, who spend much of their time updating and maintaining those systems, to focus more on pursuing University strategic opportunities and enhancements to the PeopleSoft products, and extending the software for our colleagues who use it most.

CURRENT AND FUTURE CHALLENGES

Preserving the Integrity of Our University Data

PeopleSoft provides us with the unique opportunity to access important University data from one place. None of the achievements listed above would have been possible if we had data fragmented in other places. Having a unified framework and a common language for our data allows EIS staff to easily write customizable reports or modules as the University’s needs change.

IT encourages University leaders to continue a strong project and data governance model that maintains the integrity and completeness of our enterprise systems as one system. Fragmenting University data into third party ‘shadow systems’ pulls key information out of PeopleSoft and increases institutional support costs.
TO THOSE WHO MADE THIS PROJECT A SUCCESS:

Advancement
Athletics
Auditing Services
Campus Operations
Center for the Arts
Convocation
Equal Opportunity
Finance & Accounting
Follett (Bookstore)
General Counsel
Graduate School of Business Management
Graduate School of Education and Psychology

Housing & Residential Life
Human Resources
International Programs
Office of the President
Office of the Provost
Office of Registrar
Public Affairs
Public Safety
School of Public Policy
School of Law
Seaver College
University Libraries

Special recognition to everyone who was involved in the fit-gap sessions and all past and current members of the Enterprise Information Systems team.

Your efforts are truly appreciated.