Information Services and Technology

Enterprise Applications Overview

Oracle/PeopleSoft/REMO/EDRMS

May 2015

The Team

General Administration and Project Management

David Dittaro – Director

PeopleSoft Campus Solutions

Dave Erno – Service Delivery Manager

Barbara Peebles – Business Analyst

Robin Wilson – Business Analyst

PeopleSoft Human Capital Management

Lorraine McCrimmon – Service Delivery Manager

Afroza Shivji – Business Analyst

Lisa Da Silva – Business Analyst

PeopleSoft Financials and REMO

Ceinwen Arndt – Service Delivery Manager

Kerry Cohoon – Business Analyst (Financials)

Tamin Pretty – Business Analyst (Financials)

Michael Ironside – Business Analyst (REMO)

Suzelle Umeobieri – Business Analyst (CAUS)

PeopleSoft and REMO Technical Team

Will Cheng – Technical Manager, HCM/CS

Norman Brown - Technical Manager, Finance & Research

Janet Arndt – Security/Business Analyst

Yan Chen – Technical Analyst (REMO)

EDRMS

Suresh Joshee – Enterprise Content Management Senior Developer

James Hansen – Enterprise Content Management Developer

Enterprise (Snapshot)

Bear Tracks (Student and Employee Self-Service)

- Employee Center
- Instructor Center
- Applicant/ Student Center
- ePay
- eBenefits
- eProfile

PeopleSoft Campus Solutions 9.0

- Campus Community
- Recruiting & Admissions
- Records & Enrollment
- Curriculum Management
- Financial Aid
- Student Financials
- Academic Advisement
- AdAstra (Course Scheduling)

PeopleSoft HCM 9.0

- Human Resources
- Time & Labour
- GT Smart Forms
- Base Benefits
- Payroll

PeopleSoft Financials 9.1

- Billing
- Receivables
- General Ledger
- Projects
- Grants Management
- Customer Contracts
- Payables
- Purchasing
- Travel & Expenses
- Asset Management
- eProcurement

Huron Research Ethics & Management Online (REMO)

- Research Ethics Board (REB)
- Animal Care and Use Committee (ACUC)

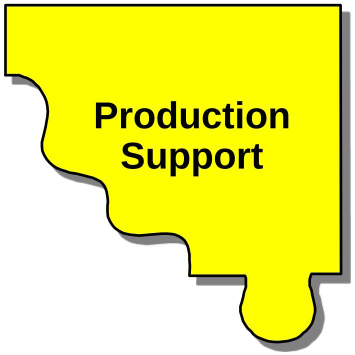
PeopleSoft Training Online

- User Productivity Kit

Alfresco Electronic Document & Records Management

- Records Management
- Form Management
- Compression & Download

Application and Infrastructure Services



- Application Production Support
- Application Security Services
- Database Management Services
- Batch Management
- Patch Application
- Infrastructure Currency

Oracle/PeopleSoft

- TCS — Application Management Services
- IBM — Infrastructure Management Services

REMO

- IST — Application Management Services
- IBM — Infrastructure Management Services

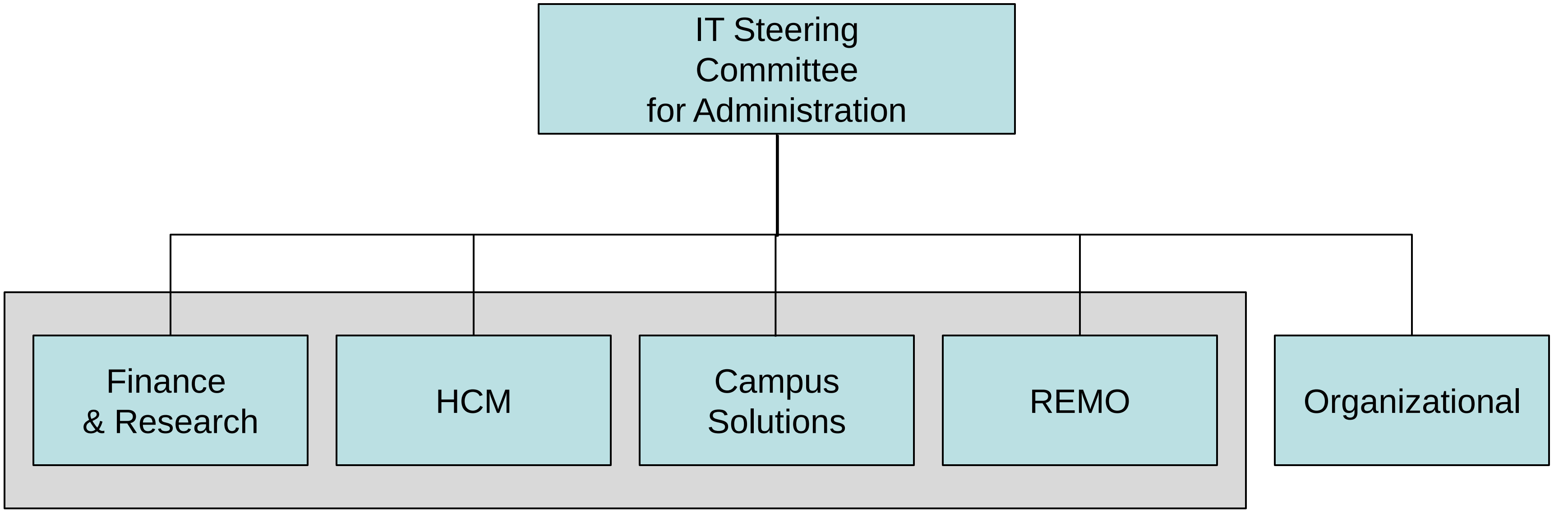
EDRMS

- IST — Application Management Services
- IST — Infrastructure Management Services

Relationship Management

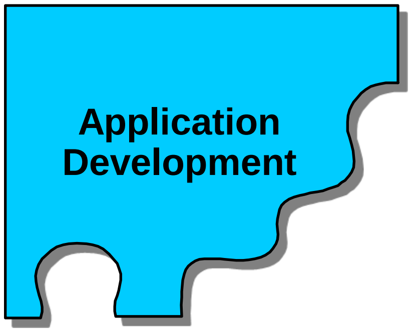
- Change Advisory Boards
- IST Steering Committee
- Change Release Planning
- Business Needs, Goals & Objectives
- Business Process Evaluation and Innovation

Governance



IT Steering
Committee
for Administration
Finance
& Research
HCM
Campus
Solutions
REMO
Organizational

Program & Project Management



- New Module and Feature Deployment
- Application and Tools Upgrades
- Solution Integration and Improvement
- Change Release Management
- Application Training Development
- Implementation and Warranty Support

Oracle/PeopleSoft

Various
New
Development Services

TCS
Application
Management Services

IBM
Infrastructure
Management Services

REMO

IST
Application
Management Services

IBM
Infrastructure
Management Services

EDRMS

Various
New
Development Services

IST
Application
Management Services

IST
Infrastructure
Management Services

Administration & Management

- Major Development Planning
- Vendor Negotiation and Service Delivery Management
- Risk Management and Quality Assurance
- Security and System Audits
- Contract Performance Management

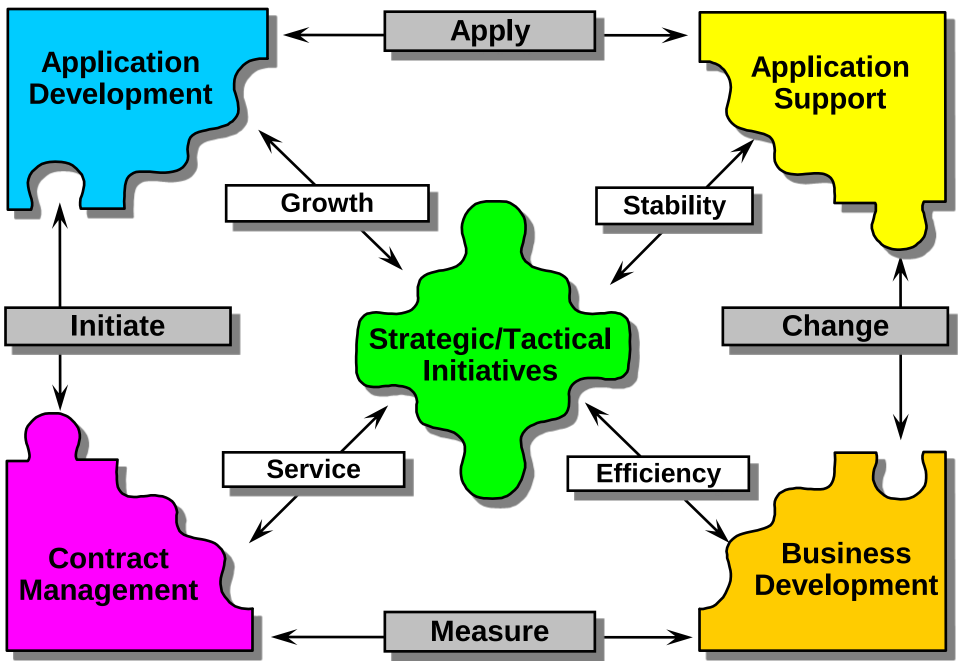
Enterprise Applications

Project Management

- Application and Tools Upgrades
- Project Training Development
- Knowledge Transfer and Transition Management
- Implementation and Warranty Support

Application and Infrastructure Management Services

- New Module Implementation
- New Feature, Function and Technical Tool Deployment
- Solution Integration
- Continuous Solution Improvement
- Change Release Management



- Application Security Services
- Application Production Support
- Database Management
- Batch Process Management
- Patch Application
- Infrastructure Currency

- Major Development Planning
- Vendor Negotiation
- Vendor Service Delivery Management
- Risk Management and Quality Assurance
- Security and System Audits

- Change Advisory Boards
- AIS Steering Committee
- Change Release Planning
- Business Needs, Goals & Objectives
- Business Process Evaluation and Innovation

Administration and Management

- Budgeting and Forecasting
- Operations and Financial Management
- Contract Performance Management

Relationship Management

Implemented Enterprise Applications

Application	Description
Bear Tracks	Is the self-service HCM/Campus Solutions module that allows University constituents access to view and manage items related to their relationship with the University. Constituent groups include employees, instructors, prospects, applicants, students, former students and guests.
Human Capital Management (HCM)	Enables the U of A to plan workforce requirements, commence employment, manage employment activity, administer compensation and benefits programs, generate payroll and produce operational and legislated reports.
Financials	Enables the U of A to control and monitor costs, track operating and capital costs throughout the procurement cycle, perform revenue and customer collections management, track project costs, and produce operational and financial reports
Campus Solutions	Enables the U of A to manage all aspects of academia and the student lifecycle including, but not limited to, recruitment, admissions, advisement, records, course/class/exam management, grading, graduation, scholarships and awards, tuition and fee assessment and payment and all verification and certification of the above-mentioned processes (e.g. taxation, transcripts, degrees, etc.)
Research Ethics and Management Online (REMO)	REMO provides a system for institutional research ethics management that enables the preparation, submission, review, and approve of research ethics applications online. The system helps the UofA to stay compliant from protocol creation to study completion, as well as the post-approval monitoring of animal research activities. In addition, REMO allows for ancillary and operational review and approvals from units such as Environmental Hazards, Animal Facilities, and Research Services Office (RSO) and external units such as NACTRC, Covenant Health and Capital Care.
User Productivity Kit	Is the Oracle-delivered training development tool that allows the U of A to easily create task- and role-specific, web-based training. It is important to note that training development is not restricted to Oracle-based applications (it is platform-agnostic), but pre-recorded training content on PeopleSoft applications is delivered with the software.

Implemented Self-Service Modules

Module	Description
Employee Center	Allows employees access to view/print paycheques, view/edit direct deposit banking information, view benefit summary information, grant/withdraw consent to receive electronic T4 tax information, view/print tax slips and view vacation/banked time information. Employees also have access to view/edit their own personal information such as preferred name, addresses, phone numbers, email addresses and emergency contacts.
Instructor Center	Allows instructors access to view teaching and exam schedules, view/print/download class rosters, send email notifications to enrolled students, view/print/download grade rosters, upload/input/submit final grades for students, view/print grade distribution reports for classes, assign web sites to classes that students will see the link to in their class schedules, search for classes and browse the course catalog. Instructors also have access to view/edit their own personal information such as preferred name, addresses, phone numbers, email addresses and emergency contacts.
Applicant/Student Center	Applicants can view the status of their application, including items outstanding and received in support of their admission. Once admitted, applicants can also view/print a report showing the status of transfer credit, where applicable. Students have access to view/edit the course planner, view/edit the schedule builder, view/edit the watch list, view/print/download the class schedule, view class textbook and materials information, add/drop/swap/validate classes, view enrollment dates, change program (when admitted to more than one program), view/print official correspondence, view grades, view tentative and final exam schedule information, view/print unofficial transcripts, request official transcripts, view/print the statement of results, request verification documents (proof of enrollment and degree/certification), view the status of official transcript and verification document requests, apply for graduation, view/edit graduation status, view/edit direct deposit banking information for tuition refunds, view/print fee assessments, view/print T2202A and UPass tax forms and submit online payments for tuition and fees. Applicants and students also have access to browse the course catalog, search for classes, view/edit their own personal information such as preferred name, addresses, phone numbers, email addresses and emergency contacts. Additionally, both have access to view/accept undergraduate awards, view financial account details and view financial holds.
ePay	Allows employees to view/print paycheques, view/edit direct deposit banking information, grant/withdraw consent for electronic T4 tax slips, and view/print T4 tax slips. Provides links to helpful information on viewing/printing paycheques, updating direct deposit and tax filing instructions.
eBenefits	Allows employees to view a summary of their benefits enrollment and dependent/beneficiary information. Provides links to benefit specific information available on the University of Alberta Human Resources site. Allows NASA employees to view leave balances and absences for vacation and banked time.
eProfile	Allows employees to maintain their own profile. Employees can view/edit names, addresses, email addresses, phone numbers, and emergency contacts. Provides additional information on names changes and University of Alberta Alerts.

Implemented Campus Solutions Modules

Module	Description
Student Financials	Tuition and fee setup and assessment, charge and payment management and processing, student and third party billing, cashiering, third party contracts, refunds, collections, general ledger interface with Finance system, T4A and T2202A tax receipt generation and maintenance (in coordination with student records).
Records & Enrollment (subset of Student Records)	Enrolling students in classes, student term information, career and program information, enrollment summaries, term processing, enrollment reporting, enrollment verifications, transcripts, graduation, transfer credit evaluation, transfer credit rules, academic standing, tax reporting.
Curriculum Management (subset of Student Records)	Course catalog setup/maintenance, schedule of classes setup/maintenance, enrollment requirement/requisite setup/maintenance, facility and event information including exams, class roster generation, attendance roster generation, grading, instructor/advisor information.
Recruiting & Admissions	Maintaining prospects, admission application entry/maintenance/evaluation/processing, application fee/deposit setup/maintenance, external test score loading/processing, electronic application/transcript loading/processing, all auditing and reporting to support admissions application entry/maintenance/evaluation/processing - graduate and undergraduate.
Academic Advisement	Setup and maintenance of all rules and logic to support academic advisement functionality for the Faculties currently using this module. This includes course lists, academic requirements, requirement groups, course sharing rules, requirement usages, entity groups and dynamic conditions. Generation of advisement reports to be viewed/used by advisors in CS and students in Bear Tracks.
Financial Aid	Currently being utilized to support undergraduate scholarships and awards. Includes setup and maintenance of all scholarship and awards, setup/maintenance of all tables that support the awarding process, student aid year activation, award processing, assigning awards to students, authorizing and disbursing awards, posting monetary awards to the student financial account, posting honor/award information to the student record/transcript. All processes and reporting to support the scholarship and awards lifecycle.
Campus Community	View and maintain all aspects of every constituent’s personal data, including addresses, emails, phones, ethnicity, languages, decedent data, FOIPP status, relationships/affiliations, names, emergency contacts, work experience, citizenship status, visa/permit data, residency data, external system ID, honors and awards, athletic participation. Also includes all processes and interfaces to support relationship transfers to the IMS for CCID creation. Additionally, add/updating person records is housed in this module for the Create Person/Affiliation processes.
Ad Astra	Facility scheduling software that integrates with Campus Solutions to assign room bookings and unify the entire campus on one highly visible system to eliminate double-bookings; optimizes academic room assignments for better space utilization.

Implemented HCM Modules

Module	Description
Human Resources	Setup and maintenance of organization structure and control tables required for business processes. Adding and updating person (name, address, email, etc.), human resource (department, job code, compensation details, etc.), and position records into the system. Viewing and reporting on employee, job, compensation, and position data.
Time & Labour	Organizing support staff into time reporting groups. Reporting and approving time. Tracking compensatory time off. Managing reported time and exceptions. Processing payable time.
Payroll	Set up and maintain earning and deduction codes, pay groups, pay calendars and pay periods. Establish garnishment payment and processing rules. Setup and maintain direct deposit, deductions and additional earnings for employees. Setup and maintain Canada Savings Bonds and Payroll Savings program information. Process payroll, post to the General ledger, produce third party payments and create a bank file for direct deposit or print cheques as required. Produce reports to monitor payroll processing and comply with regulatory and tax reporting requirements.
Base Benefits	Set up and maintain benefit plans, programs, rates and calculation rules. Enter and maintain dependent/beneficiary information for employees. Manually enroll employees and dependents into benefit programs and plans. Calculate and maintain leave balances. Send enrollment and change data to third-party benefits administrators (e.g. Alberta Pension Administration, Sun Life). View benefits enrollment summary and leave balances. Produce reports to monitor benefits enrollment and contributions.
GT Smart Forms	Smart Forms are online forms that capture employee information and related approvals for hires, job changes, and employment status changes. Smart forms eliminate redundant data entry, improve the tracking of forms, and improve access to information.

Implemented Financials Modules

Module	Description
General Ledger	Controls, monitors, administers and reports on financial information across the broad spectrum of accounting environments. Features and functions include journal entries, budget journal entries, ledgers and allocations. General Ledger receives data from each subsystem (PeopleSoft or third-party) including payroll journals from HCM, student accounting entries from Campus Solutions and external interfaces from Department program applications.
Payables	Tracks vendor information and provides vendor balances, invoice and payment processing. Receives external voucher interfaces from Campus Solutions and Department program applications. Payables also integrates with Receivables to process customer refunds.
Purchasing	Enables on-line management of purchase requisitions (open, approved, closed and cancelled) and purchase orders (open, dispatched, closed and cancelled). Offers the ability for users to inquire on procurement transactions from requisition to vendor payment.
eProcurement	Enables purchase requisition entry and online approval workflow (online or via email) at a requisition line level. User have the ability to monitor purchase requisitions through the purchase requisition lifecycle.
Receivables	Tracks customer information, outstanding items, customer account balances, payment information, aged analysis and collections to effectively manage customer activity. Receivables integrates with Billing to receive and maintain outstanding items for customer invoices. Receivables delivers functionality to generate customer refunds to Payables, generate finance charges for delinquent items and produce customer correspondence including follow-up letters, dunning letters and statements.
Billing	Generates billing invoices from multiple sources including Contracts, external Department program applications and manual on-line data entry. Billing supports generating customer invoices (single and consolidated), credit notes and adjustments. Billing integrates with Receivables to establish outstanding items and customer account balances.

Implemented Financials Modules

Module	Description
Grants Management	Create and submit research proposals. Track the status of research proposals and related processing tasks throughout the application lifecycle from proposal creation to project activations. The status of a proposal can be viewed by principle investigators, project administrators and faculty administrators via the Researcher Home Page.
Customer Contracts	Setup, maintain, update and monitor generated research contract awards including the future scheduling of sponsor invoices and management of sponsor award balances.
Project Costing	Setup, maintain, and manage operation, capital and research projects. Track the status of projects, manage project activities and monitor project balances. The status of a project and project balances for research awards can be viewed by principle investigators, project administrators and faculty administrators via the Researcher Home Page and the Electronic Research Administration and Control (eTRAC) reporting solution.
Expenses	Enter, submit and approve (online or via email) travel & expense claims and travel advances for operational and research expense reimbursements (including professional expense reimbursements). Provides the ability to redistribute travel & expense claims between valid ChartField combinations (SpeedCode).
Asset Management	Setup, enter and maintain capital assets of the institution. This includes the monthly depreciation of amortizable assets. Pooling of attractive assets for recording of the financial value of equipment assets. This includes tracking the status of such assets (new, in service, transfers and disposals).

Implemented REMO Modules

Module	Description
Research Ethics Board (REB)	Enables efficient submission, review, and approval of research ethics for studies involving human participants from UofA researchers, as well as external investigators from NACTRC, Covenant Health and Capital Care. The system helps the institution to stay compliant from protocol creation to study completion, and includes notification for ancillary and operational approvers such as the Research Services Office (RSO) and Environmental and Hazards Safety units.
Animal Care and Use Committee (ACUC)	This component supports comprehensive content and efficient workflow and management of compliant institutional ACUC processes from application preparation to electronic submission, review, and approval. Required additional security and authorization layer for working with animals are applied to UofA researchers, as well as external investigators from NACTRC, Covenant Health and Capital Care. The system helps the UofA to stay compliant from protocol creation to study completion, and includes notification for ancillary and operational approvers such as the Research Services Office (RSO), Animal Facilities, and Environmental and Hazards Safety units This component also includes Post-Approval Monitoring (PAM) which allows the PAM committee as well as veterinarians to schedule site visits to monitor and report on procedures and incidents, when applicable.

Implemented EDRMS Modules

Module	Description
Records Management	Users have the ability to upload, declare, file and categorize records based on business rules, contents and properties with a full audit trail.
Compress & Download	This extension allows you to add action "Compress and download" in the document library of sites and in the Repository View. With this action, you can easily download various contents (files and/or folders), all compressed into a ZIP archive.
Form Management	Manageable layer between Alfresco's content model and the end user. Applies metadata to a document which requires user input. This module allows rapid form development in Alfresco. Each form deploys an Alfresco content model so that you can store new metadata without coding or restarting the server.