<table>
<thead>
<tr>
<th>Today</th>
<th>Next Change Network Roundtable</th>
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<tbody>
<tr>
<td>3:00-4:00 pm</td>
<td>Thursday, October 19, 2017 3:00-4:00 pm</td>
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<tr>
<td>Kissam Multi-Purpose Room, C210</td>
<td>Kissam Multi-Purpose Room, C210</td>
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Agenda

• 3:00-3:05–Welcome

• 3:05-3:15– Roles in Oracle Cloud  
  Josh Vincent

• 3:15-3:25– Communication Strategy, Key Dates, & Blackout Dates  
  Josh Vincent

• 3:25-3:30– HR Line Manager Role Overview  
  Kara Sundar

• 3:30-3:45– Flight School, Learning Exchange Content, Next Steps  
  Amanda Roberts

• 3:45-4:00–Questions & Wrap Up
Roles in Oracle Cloud

Josh Vincent
Roles in Oracle Cloud

- Approval Group
- Financial Unit Manager
- HCM Specialist
- Functional Offices
- You
Key Players in Routine Business

Who initiates _________ transaction?
Who approves _________ transaction?
What about __________ who is involved today?
Where should I go if I don’t know where to start?
HCM Actions

HCM Specialist

Key Player
Hiring an Employee

Categories of hiring

- Taleo
  - Staff
  - VTS
- Non-Taleo
  - Faculty
  - Students

In your business unit

- HCM Specialist
- Line Manager

Functional Offices

- Recruiters
- Student Employment
- VTS

Approval

- Business Unit Approval Group
- Central HRIS

Financial Unit Manager
For Taleo Requisition
New Positions

- In your business unit
  - HCM Specialist
  - Line Manager

- Functional Offices
  - HR Consultants

- Approval
  - Business Unit Approval Group
  - Central HRIS
Setting and Adjusting Compensation

From establishing the rate of pay for a new hire to awarding one-time or recurring compensation:

- Stipends (Undergraduate and Graduate)
- Staff and Faculty Relocation and other Bonuses
- Promotional Increases and Raises
- Adjusting Funding Sources

8 Approval

In your business unit

HCM Specialist | Line Manager

Functional Offices

Student Accounts | Student Employment | HR Consultants

Approval

Business Unit Approval Group | Central HRIS
Time Entry / PTO / Leaves

• Entering Time ("eTimesheet" for non-exempt employees
• Requesting Time Off (PTO Plans for Exempt Staff)
• Requesting Leaves (FMLA, TMLA, etc.)

**Escalation:** Timecards can be approved centrally if a line manager does not act timely
Finance & Procurement Actions

Key Player

Financial Unit Manager
• Expense reports are no longer submitted using Concur
• To submit an expense report, users must have a record in Oracle HCM
• **Escalation:** 5 Days (to Financial Unit Manager’s Line Manager)
Procurement

- Receiving is handled by the goods/services recipient
  - Usually the procurement requester
- Catalog requisitions issue Purchase Orders directly to the vendor
- Non-Catalog Orders (using Smart Forms in Oracle Cloud) move to Buyers and Sourcing Officers in Procurement & Disbursements after departmental approval
- **Escalation**: 5 Days (to Financial Unit Manager’s Line Manager)

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In your business unit

- Procurement Requester

Functional Offices

- Procurement & Disbursements
  - Fixed Assets

Approval

- Financial Unit Manager
  - Approval Group
  - Vice Chancellor
Internal Transactions

- Intercompany Billing
- Journal Entries
- Revenue/Royalty Distributions
General Chart of Accounts Needs

- Selection/use of the correct Chart of Account string values
  - Program or Activity
  - Transaction Types:
    - Procurement
    - Expense Reports
    - Labor Distribution (e.g., grants funding)

In your business unit

- Financial Unit Manager
- Approval Group

Functional Offices

Central Finance
Resources

Coming Soon!

• Published **process details**

• Published **local role assignments**

• **Points of contact** for functional areas
Communication Strategy, Key Dates, & Blackout Dates

Josh Vincent
Boarding Early December through Early January

Check the SkyVU website for the most up to date information!
Important SkyVU Transition Dates
Cutover Prep Key Dates

Sept 30
Unrestricted Cost Center & Faculty Fund Cost Center Setups End

Nov 30
Cost Center Setup for Grants, Cores
Cutover Prep Planning

Complete HR changes needed this calendar year by the end of November as much as possible

Don’t process HR changes that aren’t effective or needed until January 1 or after. You will do those in Oracle starting in January.

Place December orders as early as possible!

Plan expense report processing to be complete by mid December. Includes OneCard approvals.
Data Conversion from Legacy Systems

- Dec 1: Convert 14,000 Cost Centers to New COA
- Dec 6: Load 10,000 Employee Records
- Dec 15: 17mo. of converted balances for 14k cost centers, fixed assets, projects, AR-grants
- Dec 22: 10,000 open POs, 6,000 vendors

Expenses & Procurement

- Dec 15: 2,000 Awards
- Dec 22: 4,000 Projects (manual input)

Grants

- Dec 15: 2,000 Awards
- Dec 22: 4,000 Projects

Dec. converted balances, PPM project costs, General AR, Project Balances

Oracle GL Opens

- Jan 8: Oracle GL Opens

Expenses & HR Transcations

- Jan 3: Oracle Open

Purchasing

- Jan 2: Biweekly Payroll Timekeeping Begins

Timekeeping

- Jan 2: Biweekly Payroll Timekeeping Begins

Manager Time Approvals Due

- Jan 2: Biweekly & Weekly Manager Time Approvals Due

Oracle Open

- Jan 2: Biweekly Payroll Timekeeping Begins

*excludes ePAC RDCs which continue through Dec. close

expected milestone dates as of 9/14/2017

*excludes ePAC RDCs which continue through Dec. close
December Close & Systems Access

December Close will occur as normal January 2 – 5.

All legacy systems will be used during the close: GL, PeopleSoft HR & APPO, ePAC **RDCs**, etc.

Read only access to Legacy systems will remain for a period of time after December close.
HR Line Manager Role

Overview

Kara Sundar
<table>
<thead>
<tr>
<th><strong>ALWAYS</strong></th>
<th><strong>SOMETIMES</strong></th>
<th><strong>NEVER</strong></th>
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<tr>
<td>• Direct Reports</td>
<td>• Where a FUM is a direct report:</td>
<td>• Facilitate Labor Distribution (Employee Costing)*</td>
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<tr>
<td>• Exempt Time-Off: Approve/Reject Requests</td>
<td>• Escalated Transactions (stale): Approve / Reject</td>
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<tr>
<td>• Non-Exempt Timecards: Approve/Reject</td>
<td>• Initiating HCM Transactions (where designated as appropriate by area/person)</td>
<td>• *HCM Specialists only</td>
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<tr>
<td>• Expense Reports: Receive FYI notification</td>
<td>• Initiate new hire and add non-employees</td>
<td></td>
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<tr>
<td></td>
<td>• Initiate transactions for existing employees within hierarchy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• As a hiring manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• In Taleo, working with their HR Specialist (same as current state)</td>
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Learning Program
Update
Amanda Roberts
SkyVU Flight School Kick-Off

October 2-4, 2017
Student Life Center Ballrooms

Oct. 3
11 am – 3 pm
Learning Fair
Breakout Sessions

Oct. 2 & 4
Invitational Sessions
First 300 people receive a FREE t-shirt!
The Learning Fair
SLC Ballrooms B&C

11:00 a.m. – Doors Open & Check-In Begins

FIRST 300 PEOPLE RECEIVE FREE T-SHIRT

11:15 a.m. – Welcome with Eric Kopstain

11:00 a.m.-3:00 p.m. – Visit Terminal Gates

• Preview content from subject matter experts at gates
• Sign up for in-depth training classes
• Light refreshments available

3:00 p.m. – Doors Close
Breakout Sessions
SLC Ballroom A

11:30 a.m. – Expense Reports (Session A) with Tiffany Gregory

12:00 p.m. – Non-exempt timesheet preparation & approval (Session A) with Dave O’Ferrell

12:30 p.m. – Exempt PTO request & approval with Terri Armstrong

1:00 p.m. – Expense Reports (Session B) with Tiffany Gregory

1:30 p.m. – Non-exempt timesheet preparation & approval (Session B) with Dave O’Ferrell

2:00 p.m. – Procurement Initiation with Chuck Nicholas
See the premiere of the SkyVU Testimonial Video!
Training Modules Available

Preview learning modules prior to Flight School!

To Locate:
Search “SkyVU Learning Program” in the Learning Exchange and enroll in “Information for Vanderbilt Employees”
Next Steps

Learning Exchange Content Available

Search “SkyVU Learning Program” in the Learning Exchange and enroll in “Information for Vanderbilt Employees”

Flight School Kick-Off

- Invite your area to attend: October 3, 11-3, SLC