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# HR/Payroll & Finance Departmental Systems 101

*Ensuring a Smooth Transition for Departmental Systems*

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## Departmental Systems Play an Important Role

A number of departments use side systems, referred to as “departmental systems,” to meet reporting and information management needs not currently met by the University’s enterprise systems. Examples of departmental systems include InfoPorte, MIS and ITWorks.

Implementing PeopleSoft will change how data is made available to departmental systems, and it may change the type of data available. Since departmental systems are important to your processes, it’s important to be aware of all changes that affect your systems and to plan for how you will address them.

### The Best Place to Learn About Technical Changes

The **Applications Collaborative** is a group formed to keep campus technical personnel informed about technical changes resulting from the PeopleSoft implementation.

To join the Applications Collaborative, contact Debra Beller at [debra\\_beller@unc.edu](mailto:debra_beller@unc.edu).

## Being Aware Is Key to a Smooth PeopleSoft Transition

To ensure your departmental systems are ready for the transition to PeopleSoft, be sure to:

- Explore PeopleSoft and new reporting functionality to determine if supporting your departmental systems is still worthwhile. PeopleSoft and its complementary reporting tools may offer sufficient reporting functionality to allow you to eliminate your departmental system.
- Begin planning now to ensure that all necessary changes are made to your departmental systems before go-live.
- Have a representative from your technical team participate in the Applications Collaborative (see the box on the left for details). These meetings are the best place to learn about the impact to your departmental systems.
- If your departmental systems access enterprise data, be sure to review the University’s IT security standards before go-live. Departmental systems will only be able to access PeopleSoft data if University IT security standards are followed.

## Here's What You Need to Know

### 1) *Near Real-Time Access to Data*

Authorized departmental systems will have continuous, “near real time” access to PeopleSoft data. Access will be provided through standard data structures, which means access to data will not be tailored to individual departmental systems.

### 2) *Business Intelligence Platform Provides Ad Hoc Access*

For ad hoc access to data, departmental systems will have access to a comprehensive business intelligence platform called Oracle Business Intelligence Enterprise Edition (OBIEE). OBIEE will provide read-only access to Financial, Student and Human Resources data.

### 3) *Data Dictionaries Describe Data Elements*

Campus users will have access to data dictionaries that describe the data elements available in the standard data structures, including field names, descriptions, field length, format, and code table values.

### 4) *Same Security Access to Data*

Access to standard data structures and the business intelligence platform will be controlled by the same security permissions as PeopleSoft. A request for a departmental system to have broader access must be approved by the same data stewards or owners who normally authorize system access.

### 5) *PeopleSoft Is the System of Record*

Departmental systems may not serve as the system of record for data elements managed in PeopleSoft, and they may not serve as a “front-end” to PeopleSoft. Departmental systems may capture and manage information not captured in PeopleSoft, and may transform PeopleSoft data into formats, presentations and analysis needed by departments, schools and divisions.

### 6) *Protecting Data*

To keep enterprise-level Human Resources, Financial and Student data protected, departmental systems must follow University IT security standards to access PeopleSoft data.

### 7) *No Custom Data Views or Extracts for Individual Departmental Systems*

Data will be made available for departmental systems through standard data structures, which means the data provided will not be customized for each departmental system.

Enterprise-level PeopleSoft technical support resources will focus on maintaining and enhancing standard views and data structures rather than developing custom ones. They will review the standard access capabilities as PeopleSoft updates are applied and as new campus-wide needs are approved through the IT governance committee and executive sponsors.

### 8) *No Direct Updates to PeopleSoft Data Tables from Departmental Systems*

Departmental systems will be able to pull information from PeopleSoft, but will not be able to directly post or update data tables in PeopleSoft. Exceptions to this policy must be approved by the ConnectCarolina Executive Sponsors.

### 9) *Existing Batch Interfaces*

Departmental systems that currently generate financial transactions that update the legacy Financial Record System (FRS) through the standard FRS batch interface need to be converted to the delivered PeopleSoft batch interface format. All departmental systems batch interface files must be retested and recertified prior to implementation.

