

November 2, 2015

## The HCM/FIN Upgrade: Coming in December

In December 2015, the University will transition to new PeopleSoft systems for human resources (soon to be known as human capital management, or HCM) and finance (FIN). This event, the Elevate HCM/FIN Upgrade Project, has been under development for the past two years. The project's ultimate goal is to provide CU employees and affiliate fiscal staff with modern and effective tools to do their jobs.

### How does the PeopleSoft Upgrade Affect Your Department Procurement Activity?

The PeopleSoft systems upgrade will not change how you work with Concur Travel & Expense, CU Marketplace, or our various payment forms (Payment Authorization, Study Subject Payment, and Non-employee Reimbursement).

However, the PeopleSoft human resources (HCM) and FIN systems will be unavailable for a period of time during the transition to their new versions:

- HR (HCM) will be unavailable Sat Nov 21 through Wed Dec 2.
- FIN will be unavailable Fri Dec 4 through Wed Dec 9.

**Note:** HR (HCM) and FIN will not communicate with each other during the full transition period (Sat Nov 21 through Wed Dec 9). This also impacts some activity in non-PeopleSoft systems.

### Dates to Know ... about Things You Do

Concur and CU Marketplace will remain available during the transition period to all employees who were authorized to use these systems as of Sat Nov 21. However, there are a few things you'll want to know about travel, purchasing, and payable processing in order to be prepared. First of all, note the following ...

#### Fri Dec 4 through Wed Dec 9

- No warrants (checks) or employee reimbursements will be issued.
- No cash advances will be issued.
- No change orders will be processed.

In addition ... **to ensure processing is completed prior to the transition period, please follow the deadlines below:**

#### Fri Nov 20 (12:00 noon)

- Deadline to enter new employees in the human resources system. (All required training must be completed.)
- Deadline to enter changes in Reports To (supervisor) in the human resources system in order to update Concur routing/approval.

#### Mon Nov 30 (12:00 noon)

- Deadline to approve employee travel expense reports in Concur in order to issue reimbursement. (Trip must be completed.)
- Deadline to submit warrant cancellation requests to cancel payments.
- Deadline to submit invoices – including Payment Authorization, Study Subject Payment, and Non-employee Reimbursement (PA, SSP, NR) forms – to [APIInvoice@cu.edu](mailto:APIInvoice@cu.edu).
- Deadline to submit PO/SPO change order requests to [ChangeOrder@cu.edu](mailto:ChangeOrder@cu.edu).
- Deadline to request changes to AOs and default ST for Procurement Card.

#### Wed Dec 2 (6:00 p.m.)

- Deadline to finalize new or changes to existing fiscal approvers on a SpeedType. (For CU Marketplace roles, all required training must have been completed before Sat Nov 21.)

### During the Transition Period

During the transition period, authorized users can continue to process in Concur and CU Marketplace. During the transition period, users can continue to submit Travel Card, Procurement Card, and AO applications/changes. Users can also continue to submit invoices and change order requests – these will be processed when the appropriate systems (HCM and/or FIN) are available.

### Thurs Dec 10 (a.m.) – Resume Business as Usual

PeopleSoft HCM and FIN systems are now both upgraded to their 9.2 versions and can resume communications with each other and with non-PeopleSoft systems like Concur and Marketplace.

### Summary: What's Changing

- PeopleSoft Human Resources Management System (HRMS), which will become Human Capital Management (HCM)
- PeopleSoft Finance System (FIN)
- JobsatCU hiring system
- The CU Resources tab in the campus portals

### What's not Changing

- Concur Travel & Expense System
- CU Marketplace
- CU Supplier Portal
- Forms used to accomplish travel, purchasing, or payable updates
- SkillSoft learning management system

This list is not all-inclusive. If you're wondering if any other system is changing due to the upgrade, feel free to [ask for clarification](#) – but the answer is probably No.

### Questions? Comments?

Send us your [questions and feedback](#). We'll send answers to you and share your comments or concerns with the appropriate individuals.