Name: ______________________________

Dept: _______________________________

The Upgrade - Readiness Checklist

Prepare for The Upgrade with this checklist, which includes helpful links. You may not know all of this information now, but you'll need to be ready by the systems interruption planned to start on April 10. Visit upgrade.umn.edu for details.

General: Visit upgrade.umn.edu

☐ I know when The Upgrade is scheduled to begin.
☐ I know how long the systems interruption will last (this is the time when PeopleSoft and related systems are unavailable or view-only, also known as the cutover period).
☐ I know what I can and cannot do during the systems interruption.
☐ I understand that upgrades can be complex and difficult, and I am prepared to be flexible.
☐ I know where to get help during the systems interruption and after the upgraded systems launch.
☐ I have documented my "PeopleSoft favorites" so I can find what I need after The Upgrade.

Online Training and Education

☐ I have taken or intend to take training related to my areas of responsibility, as posted on http://z.umn.edu/UpgradeEducation.
☐ Other staff in my department have taken (or identified) the courses they should take.
☐ I have watched relevant sneak peek videos.

Advance Teams (see team members here)

☐ I know who the Faculty Go-To Advance Team member is for my area.
☐ I know who the HR Stars Advance Team member is for my area.
☐ I know who the Finance Advance Team member (RRC/Chief Financial Manager) is for my area

MyU portal

☐ I know what the new MyU is and how I will use it, including how to log into PeopleSoft.
☐ I know how to find personal information in MyU, including my benefits, pay, and time and absence.

Reporting Center and Data Warehouse Saved Query Users (dw.umn.edu and EFS Query Manager)

☐ I know how to navigate to the new Reporting Center in MyU.
☐ I know that UM Reports and UM Analytics will be in the Reporting Center.
☐ I know how to find which reports are changing or going away.
☐ I have documented my UM Reports favorites by title or report number so I can find what I need.
☐ Ad hoc queries from my area have been updated and tested for changing data structures.
☐ I know where to get help updating and testing ad hoc queries before and after The Upgrade.

Communications

☐ I understand what my department needs to know about The Upgrade.
☐ I receive The Upgrade e-newsletter and other communication materials.
☐ I understand my role in ensuring good communication to my area.

Faculty Support

☐ Faculty in my area know The Upgrade will change how they do things and understand what will be different for them.
☐ Faculty in my area are ready.

Human Resources: If you don't work with many HR processes, you may not know much about this area. You will receive help from your HR Stars Advance Team, but we also want you to be aware of these changes.

- ☐ I understand the importance of timely entry for position management, appointment, and recruiting.
- ☐ Our department's current position management report is accurate.
- ☐ I understand how position management will work after The Upgrade.
- ☐ I understand the importance of accurate position management, especially for pay and benefits.

Recruiting Solutions Transition (Searches)
- ☐ I know how to post new positions in Recruiting Solutions.
- ☐ I know how to view application materials.

Appointments
- ☐ I know what is changing in the appointment structure.
- ☐ I understand how employees with multiple appointments/classes/units will be entered.
- ☐ I know that working titles in the people search function may look different after The Upgrade and can be adjusted upon request by working with my HR Lead.

Time and Absence Reporting
- ☐ I understand how Time and Absence reporting will work after The Upgrade.
- ☐ Staff and faculty in my area know that how we manage time and absence is changing.
- ☐ We have a plan for making sure staff and faculty know how to enter time and absence.
- ☐ Staff supervisors in my area know how to approve/delegate approvals for time and absence in MyU.
- ☐ Our student employees know that paper time reporting is being eliminated, and the training for the new electronic process is called "Reporting Time."

Payroll Accounting
- ☐ I understand that distributions will be separate from the appointment.
- ☐ I know what a Retro Distribution is.
- ☐ I understand the timing impact of transaction posting (old system or new system).
- ☐ I know how to adjust Payroll Distributions and default ChartField strings.
- ☐ I know about the changes and enhancements made to Combo Codes.

Benefits and Appointment
- ☐ I know that job record data must be timely and accurate because this information affects employee benefits.
- ☐ I understand the relationship between the appointment and corresponding benefits.
- ☐ I understand that appointment entries (new hires, updates, terminations) need to be in the system by the effective date of the action.

Finance

If you don't work with Finance processes, you may not know much about this area. You will receive help from your Finance Advance Team member, but we also want you to be aware of these changes.

- ☐ I know what My Wallet training is and who has to complete it.
- ☐ I know how My Wallet will feed into the expense report transaction in the system.
- ☐ I know about the changes to the PCard reconciliation process.
- ☐ I know about the new WorkCenters and how they will work for document preparers and approvers.
- ☐ I know that Payroll Accounting (see HR section) is a shared process with Finance.
- ☐ I know about changes in the Billing and Accounts Receivable module.
- ☐ I know about changes in the General Ledger (Journal Entries, Speed Types, Budget Journals, and the Chartfield Request process).
- ☐ I know about enhancements made to the Endowments pages.
- ☐ I know about the system changes coming in procurement (purchasing and payables).

Student Systems: If you don't work with Student Systems, you may not know much about this area. You will get support from your Faculty Go-To Advance Team, but we also want you to be aware of these changes.

Class Scheduling
- ☐ I know who in my department manages the class schedule data input.
- ☐ My department is prepared for class schedule changes after The Upgrade.

Course Information
- ☐ I understand that the University catalogs will still be available at catalogs.umn.edu.
- ☐ I understand that the course guide is being retired and replaced by a class note with a URL that can link to a course syllabus or other course information.
- ☐ We have a plan in my college or department for managing course information through a URL.

Student Registration/Enrollment/Waitlists
- ☐ My department has a plan for assisting students during the early, shortened enrollment period.
- ☐ My department has a plan to resolve as many waitlisted students as possible before the interruption.
- ☐ My department has a plan to adjust course enrollments to account for the new auto-enroll feature.
- ☐ My college or department has a plan for managing waitlists after The Upgrade.
- ☐ I know how to access course rosters or class lists after The Upgrade.
- ☐ I know students will register for classes using a shopping cart after The Upgrade.
- ☐ I understand the impact of holds on the "auto enroll" feature and my department plans to adjust course enrollments for the new auto enroll waitlist feature.

Grading
- ☐ I know how grades will be managed via the MyU portal.
- ☐ I know that grades not submitted on time will be automatically posted and all grades not assigned will be posted as 'NR.'
- ☐ I know that shortly after the grading deadline, any "blank" grades will be posted as "NR."
- ☐ My faculty are aware of coming changes to grading.

Student Services/Advising
- ☐ I know that advisors of record (faculty or staff) will have a "My Advisees" tab in the new MyU.
- ☐ I know that existing tools such as grad planner and APLUS (where used) will still be available.

Student Records
- ☐ I know what student records can be viewed during the systems interruption.
- ☐ I know that transcripts can be printed during the systems interruption, but the information will only be as current as the start of the interruption.
- ☐ I know where to find student transfer credit and academic information after the Upgrade.

Parent/Guest Access for students
- ☐ I know that students will use the 'My Info' tab in MyU to delegate access to parents/guests, and to adjust delegated access preferences.
- ☐ I know students who already delegated parent/guest access may need to adjust it after The Upgrade.
- ☐ I know when students delegate access to their records, their parents/guests receive an email invitation that directs them to a "My Info" tab of the new MyU for parents.

Student Finance/Financial Aid
- ☐ I know that students will find financial aid and billing information in the "My Finances" tab in MyU.
- ☐ I know that student payment plans will change slightly. Students will need to opt into an installment plan.
- ☐ I know that collegiate scholarship administrators will use new PeopleSoft functionality to process scholarships.