PPP002 : Online Payslips and P60s - Project Brief

Project Brief

All staff and pensioners currently receive paper payslips on pre-printed stationery monthly. This project should deliver a method for staff on the main payroll to receive electronic payslips and P60s, while enabling certain staff to receive paper payslips and P60s if required. Consideration should be given to the impact this would have on support teams.

The project will deliver the ability to restrict the number of paper payslips created for pensioners. Although pensioners will not have access to online payslips they should only receive a paper payslip in December and April OR the first pay period they become a pensioner.

1. Overview

1.1 Background

Approximately 12,000 payslips are printed each month and approximately 17,000 paper P60s are printed, sealed and posted to home addresses each year.

This project will allow all staff on the main monthly payroll to access their payslips online. The delivered solution must allow staff to save or print their payslips as required. The project will aim to deliver online payslips via the Oracle self-service functionality.

Payslips and P60s must conform to certain standards in order to be accepted for official purposes. Online payslips and P60s must conform to the same standards as paper payslips and P60s.

As the preferred method for accessing online payslips and P60s is via Oracle self-service, then in order to remove the impact to HR on the likely increase in requests for passwords to be reset, the project should deliver a method to allow staff to reset their passwords.

The project will undertake research to ascertain whether a method allowing users to reset their oracle self-service paswords can be put behind EASE. This would bring this service into line with other university services as well as reducing the effort required by HR staff to reset user passwords.

As not all staff are currently able to access EASE, a method of resetting passwords not requiring EASE must be ensured. However the project will aim to improve the updates of the HR database with the UUNs of staff on the main payroll. Similarly, not all staff will be able to access payslips online so paper payslips will continue to be delivered in such cases.

1.2 Category, Priority and Funding

The project is discretionary and core-funded.

1.3 Contributors

Morna Findlay, Project Manager

Terry Fox, Project Sponsor

Martyn Peggie, HR Business Owner

Pam Baillie, Payroll Business Lead

Susan McLaren, HR Business Lead

Alyson Shaw, IS Applications Development Lead

Anne Finnan, IS Applciations Senior Support Analyst

Gillian Henderson, IS Applications Technical Architect

Peter Jackson, IS Applications Technical Architect

Susan Woodger, IS Applications Business Analyst

Dawn Nicholls, Payroll programme Manager

Iain Fiddes, Development Technologu Manager

2. Scope

3. Business Objectives

3.1 Payslips - Main Monthly Payroll

To deliver on-line payslips for staff on the main monthly payroll.

To allow staff on the main monthly payroll to access, save and print their own online payslips.

To enable delivery of paper payslips for staff who should receive a paper payslip.

To not produce paper payslips for staff who should receive online payslips only.

To deliver paper payslips to staff who so request (each case to be agreed with HR/Payroll).

To carry out load-testing to assess impact of widespread use of oracle self-service on current oracle service.

To carry out load testing to assess impact of delivering online payslips on payslip process.

To implement required changes, if so advised by Oracle, so that current performance is not adversely affected.

To investigate the provision of online access to payslips previously delivered on paper between April 2015 and the delivery of this project.

To amend successful-applicant e-recruitment interface to allow default receipt of online payslips to be set.

To ensure access to the employee online payslip is available to the professional users in Payroll and HR.

To enable delivery of paper payslips to all staff if required.

3.2 Payslips - Payments Payroll

To ensure continued delivery of paper payslips to staff on payments payroll.

3.3 Payslips - Pensioner Monthly Payroll

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To enable delivery of paper payslips for pensioners who should receive paper payslips.

To not produce paper payslips for pensioners who should not receive paper payslips.

To deliver paper payslips to all pensioners if required.

3.4 Access to Payslips

To investigate streamlining password resetting functionality.

To allow staff to request a password change in order to facilitate access to online payslips or P60s.

3.5 User communications

To develop a communications strategy to inform staff of proposed changes. (Business)

To use communications strategy to inform staff of proposed changes. (Business)

To update relevant user-facing documentation to reflect proposed changes. (Business)

3.6 P60s

To deliver online P60s for staff on the main monthly payroll.

To enable staff on the main monthly payroll to access, save and print their own P60s.

To deliver paper P60s for staff who should receive a paper P60.

To deliver paper P60s to pensioners.

To deliver paper P60s to staff on the main monthly payroll who so request (each case to be agreed with HR/Payroll)

To implement required changes so that current performance of the P60 process is not adversely affected.

To carry out load testing to assess impact of delivering online payslips on P60 process.

To enable delivery of paper P60s to all staff if required.

4. Project Deliverables

No.		Priority	Notes
D1	**Online payslips delivered for all staff on main monthly payroll.**	M	All pensioners,and staff receiving paper copies, cannot access
D2	Online P60s delivered for all staff on main monthly payroll.	M	All pensioners,and staff receiving paper copies, cannot access
D3	A method for staff on the main monthly payroll to access, print and save online payslips.	M	Assumed to be via oracle self-service
D4	A method for staff on the main monthly payroll to access, print and save online P60s.	M	Assumed to be via oracle self-service
D5	A facility for staff on the main monthly payroll to request paper delivery of payslips or P60s.	M	
D6	A facility for staff on the main monthly payroll to change passwords allowing access to	HD	

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No.		Priority	Notes
	online payslips or P60s.		
D7	A procedure allowing admin staff to change oracle self-service user passwords and to deliver the passwords to users.	M	
D8	Report detailing how password reset process may be streamlined.	HD	
D9	Completed load test and load test report.	M	
D11	Amendments to paper payslips.	M	
D12	Amend successful-applicant e-recruitment interface to allow default receipt of online payslips to be set.	M	
D13	A process to allow HR/Payroll admin staff to deliver printed payslips or P60s.	M	
D14	Investigation of backdating process to deliver historic payslips.	HD	
D15	One-off process to ensure all staff on main monthly payroll have correct uun associated with their staff record in the HR database.	M	
D16	Regular update process to ensure all staff on main monthly payroll have correct uun and their preferred email address associated with their staff record in the main HR database	M	IDM is source for uun, eddir is source for preferred email address
D17	A method allowing staff with access to EASE to reset their oracle self-service passwords.	HD	

5. Success Criteria

- Staff on main monthly payroll able to access payslips online.
- Paper payslips delivered to staff and pensioners in certain categories (such as staff on the main monthly payroll leaving university employment)
- Paper payslips or P60s delivered to staff or pensioners who have agreed this with HR/Payroll.
- No adverse effect on performance of Oracle.
- Online payslips and P60s are accessed via EASE.
- Staff passwords can be reset with minimum effort.
- New members of staff on main monthly payroll and new pensioners on pensioner payroll to be set up to receive online payslips by default.
- HR database contains up-to-date record of uun and email address for staff on main monthly payroll.
- Paper payslips and P60s continue to be delivered to staff on payments payroll.
- Paper payslips are not produced for staff on main monthly payroll who should receive online payslips only, or pensioners on pensioners payroll who should receive online payslips only.
- Paper P60s are not produced for staff who should receive online P60s only.

6. Project Boundaries / Exclusions

- Pensioners will not have access to online payslips.
- Pensioners will receive paper payslips when HR/Payroll decide there is a need to deliver these (typically twice a year).

- Staff who are marked to receive paper payslips will not have access to online payslips or P60s.
- Changes to delivery of payslips or P60s for staff who are not on either the main monthly payroll or the pensioner payroll falls outwith the scope of this project.
- Provision of uuns to staff who do not have uuns falls outwith the scope of this project.

6.1 Project Assumptions and Constraints

- The project will deliver online payslips and P60s using the Oracle self-service application.
- The ability to deliver paper payslips and P60s must be retained
- All staff on main monthly payroll have a uun (which is required to access EASE)
- There may be a requirement for HR to reset Oracle self-service passwords or for assistance for some staff to gain access to EASE before the switchover date.
- HR expect the provision of online payslips to generate an increase in the number of oracle self-service password reset requests and are prepared to take on this additional support load.
- Error handling and logging will be dealt with as part of the standard oracle process.
- One payslip per assignment will remain as is.
- Date when payslips are produced will remain as is.
- Configuration of Oracle and Oracle Self-Service will be carried out by the business, although IS Applications staff may advise as required.
- User documentation, communications with users and user roadshows will be the responsibility of the business.
- Sufficient Oracle Self-Service licenses will be purchased (number to be agreed by business)

Project Milestones

Target Date	Title	Stage	Complete
20-Jan-2015	End of Planning	Plan	Yes
30-Jan-2015	Analysis Review	Analyse	No
26-Feb-2015	Design Review	Design	No
19-Mar-2015	Build Review	Build	No
16-Apr-2015	Build review password reset	Build	No
04-May-2015	Acceptance Review	Accept	No
18-May-2015	Delivery	Deliver	No
08-Jun-2015	Deployment Sign off Review	Deliver	No
06-Jul-2015	Close	Close	No

7. Impact

8. Project Benefits

University will save on stationery and postage costs (up to 12,000 payslips are currently printed each month and up to 17,000 P60s are currently posted each year)

University will save staff effort (up to six days) for each print run of payslips and annual P60s.

Staff will be able to access their payslips online.

Staff will have an archive of previous payslips available to them and can print and reprint payslips and P60s at their own convenience.

Number of staff affected by delays in delivering paper payslips to staff will be greatly reduced.

Admin effort required to re-print lost payslips or P60s will be greatly reduced.

HR database will be regularly updated with correct UUNs for staff.

HR admin effort required to reset oracle self-service passwords will be reduced.

Timely delivery of payslips will not rely on physical printing.

9. Dependencies

There may be conflict for key IS Applications and Business resources from related projects and the tax year-end.

Work on upgrading and patching the DEV environment and the HR database may impact on project milestones.

Project Risks

Title	Impact	Probability	Status	Risk Owner
Unavailability of key business resources may further delay project planning milestone	Medium	High	Open	Terry Fox
Unavailability of key Is Applications resources may delay project planning milestone	Medium	High	Open	Morna Findlay
Communications excercise may miss user groups	Medium	Low	Open	Terry Fox
Gatekeepers may not communicate changes to staff	Medium	Low	Open	Terry Fox
Unavailability of key business resources (HR)	High	Low	Open	Susan McLaren
Unavailability of key business resources (Payroll)	High	Low	Open	Pam Baillie
Unavailability of IS Applications resources in lifetime of project may impact project milestones.	High	Low	Open	Morna Findlay
P60s may have to be delivered on paper	Low	High	Open	Terry Fox
Additional licenses may be require d- risk to project benefits	Low	Low	Open	Terry Fox
config changes to SSHR are not stored as data on the database but as versions of files	High	Low	Closed	Alyson Shaw

10. Organisation

10.1 Work/Task Breakdown

Functional reconfiguration (Payroll/HR)

Interface changes (IS Apps)

Testing Interfaces (HR, Payroll, Partners)

Implement new UUN/email updates (IS Apps)

Implement password resetting process (IS Apps)

Test uun/email updates and password resets (IS Apps/HR)

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10.2 Resource Estimates and Costs

Internal

IS Applications: 118 days

External

A number of additional Oracle self-service licenses for LIVE may have to be purchased. This number will be determined by the business but will not be required in DEV or TEST.

Project Stakeholders

Name	Business Area	Role	Communication Plan
Terry Fox	HR Payroll	Project Sponsor	Keep apprised of signoff and project issues. Terry has delegated signoff and most decisions to Pam
Pam Baillie	HR Payroll	Business Lead and Deputy Sponsor	
Susan McLaren	HR	HR Business lead	
Dawn Nicholls	IS Applications	Payroll and Pensions programme Manager	
Alyson Shaw	IS Applications	Senior Development Lead	
Anne Finnan	IS Applications	Senior Support Analyst	
Employees on main Payroll	All	Owners of payslips and P60s	HR to consult with and inform employees
Martyn Peggie	HR Business Partner	Representing HR interests	Keep informed of developments via Susan McLaren
Pensioners	Retired	Owners of payslips and P60s	
Gillian Henderson	IS Applications	Senior Technical Architect	
Peter Jackson	IS Applications	Senior Technical Architect	
Peter Jackson	IS Applications	Senior Technical Architect	
Employees on payments payroll	All	Customers	Keep informed of proposed changes. Ensure proposed changes are publicised and documented.
Henry Emmanuel	Payroll Manager	Business Expert	Circulate project brief
Chris McKay	IS Service Management	IDM Business Owner	Advise on issues relating to updates of uuns from IDM to HR
Graeme Wood	ITI UNIX	EDDIR business owner	

Project Estimations

Title	Spreadsheet	Stage	Date Completed
Plannin estimate	PPP002-planning-17-12-14.xls	Plan	17-Dec-2014
Planning Estimate 15-1-15	PPP002-planning-15-1-15.xlsx	Plan	15-Jan-2015

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