## UTSA Change Leaders Meeting
### Conference Call
#### June 28, 2013

6/28/13, 2:00pm

### No Action Items

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<th>Action Items</th>
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### Meeting Discussion

#### Attendees:

**CM Team**
- Kari Peterson
- Carlos Gonzales
- Jacquelyn Kyle
- Henry Barrerra
- Rene Paniagua
- Veronica Guerrero

**Change Leaders**
- Rosanne Gorny – *College of Engineering*
- Benga Adeeko – *Vice President for External Relations*
- Claudia White – *Human Resources*
- Nancy Woodward – *Administration*
- Cheri Bratton – *Vice President for Academic Affairs*
- Deryl Martin – *Vice President for Academic Affairs*
- Ashley Zaldivar – *Financial Affairs*
- Lorrie Smith – *Accountability & Institutional Effectiveness*
- Elba Ramos – *SBDC Regional Office*
- Shirley Glass – *Vice President for Research*
- Ana Reynolds – *Vice President for Academic Affairs*
- Martha Hinojosa – *Human Resources*
- Stacy Williams – *Vice President for Research*
- Diane Cordova – *Vice President for Academic Affairs*
- Vicki Weber – *Vice Provost-Downtown*
- Belinda Dovalina – *Facilities*
- Dana Rozelle – *OIT*
- Lynn Bishop – *Vice President for Academic Affairs*
- Terri Reynolds – *Vice President for Academic Affairs*
- Maria Alvarez – *Vice President for Academic Affairs*
- Bob Miller – *Vice President for Student Affairs*
- Nathan Flory – *Vice President for Student Affairs*
- Elenamarie Ellis – *College of Public Policy*
- Becky (no last name)
- Jayashree Iyengar – *OIT*
**Change Management Lead - Kari**

- Started the call by welcoming everyone and proceeded with introductions of Change Management PeopleSoft Team that were on the call.
- Advised the purpose of the call is to introduce the revised PeopleSoft/UTShare deployment plan to the campus Change Leaders and to invite them to have an interactive dialog with the project team with any questions and concerns.
- Gave some background information that at the end of May, Change Leaders were informed that a delay in the September go-live was likely, shortly thereafter the March 1, 2014 date was announced. More information about the March 2014 plan as we know it is being provided today. There will be more information forthcoming as project details are solidified.
- The Executive Committee met earlier this week on the revised deployment plan and reached a decision to move forward.
- The floor was then turned over to Jacque to speak in detail about the revised deployment plan.

**Project Manager - Jacquelyn**

- Explained what the revised deployment plan is about. Go-live will provide all functionality for all people. All activities necessary to manage daily activities will happen in March. What will be deployed is workflow approval for transactions.
- There will be limited Employee Self-Service (ESS) access but functions at go-live include the first five bulleted items on the diagram. Explained what ESS is and went over all of the Limited ESS/Workflow to ensure that these functions will be active.
- Full functionality will happen in March but the activities will be done in sequence.
- Consolidated budgeting and workflow will allow admins to do all process so that workflow will not be interrupted. The workflow that you’re accustomed to will not be running and will be done manually for about 4 months until the approval processes can be done in PeopleSoft.
- Reiterated full functionality will be in March but the activities will be done in sequence.
- Opened up for Q&A but no one had any so she moved on.
- Explained the Sequence 1 and how it will happen. Everyone should have some familiarity of the day-to-day business so that when Sequence 1 comes you will see the flow.
- Workflow approvals will be turned on in similar fashions that they are used to.
- Explained Manager Self Service (MSS) and workflow approval.
- The approval processes will be functioning on a management level.
- Managers will be able to do the processes that are needed.
- Sequence 1 means more people will have access to PeopleSoft.
- Explained that there will be Manual workarounds that will have to be implemented while we are in transition from DEFINE to PeopleSoft. She then gave the example of hiring for a new position. All approval processes will be having to be secured externally of the system. It will not happen in the system. This process will not be able to use PeopleSoft to track the flow of the request. This is a process that will be created because it’s not a part of the PeopleSoft system. It will be worked on so that PeopleSoft will be used for it.
- Sequence 1 will be opening approval process in a wider way across the campus.
- Proceeded to talk about Sequence 2.
- In Sequence 2 all campuses will have the opportunity to engage their timesheets themselves. Not through the admins as it will be done for now.
- Sequence 1 opens it up to admins and key staff only. Sequence 2 opens to all campus staff & faculty.
- This process will help with the engagement across the campus.
- September 2014 will be the full transition to the campus. Full production and processing with all features activated. Therefore project closure is anticipated after that.
- Based on plans for go-live, training will begin around January/February 2014. Looking for training rooms and space for this to happen.
Questions came in:
- Terri Reynolds asked about purchase orders
  - Rene answered that there will be manual workarounds for purchase orders, there will be some manual processes.
- Vicki Weber – There are certain deadlines tied to certain processes. How can departments ensure that deadlines will not be missed that have access to workarounds?
  - Manual workarounds that will have a facility to have your workarounds addressed. Admins will have full training, no departments will be left out.
- Informed the Change Leaders that the PeopleSoft team had met and viewed the deployment plan for the first time during the week and they had several questions. She explained to them that she will be reading some of the questions.
  - With people having to do manual processes – have there been discussions with OIT to get multiple email accounts?
    - We have had discussions about the manual processes, but we don’t know the HOW.
  - From this slide there seem to be a lot of things missing, such as “View comp time,” “Absence Balances” and “View payable Time”.
    - Yes, it would have been better to say “View all items”.
  - When can we get more details for the sequencing? When will we know what the department admins have access to?
    - It is still being discussed but in Jacque’s opinion, it will be after integration testing. Right now the focus is March 2014 and the workarounds. Functionality for March 2014 has a lot of dependencies on ARDC and how everything functions.
  - There is a concern to go-live in March and go-live with Hyperion budget and planning – it will be a strain on the same people. Are there other alternatives?
    - Executive Committee has discussed, however it was decided that this was the best window of time.
- Reiterated that all ESS functions will not be released in March, only limited functions until Sequence 1.
- Opened the floor for questions
  - Q1 Anticipate the workaround will cause slowing down and deadlines may not be met. Will there be new deadlines for processes?
    - The process will be the same and deadlines will be the same. Not sure it will be much slower than what it is now.
  - Q2 Will you be able to demo functionality of PS?
    - We are looking for an environment prepared, the environment is being refreshed and upgraded. A review this fall.
  - Q3 Will we use PS for timekeeping?
    - Timekeeper personnel be able to enter the time. After Sequence 1 then others will have access.
  - Q4 At Library, individuals enter their time themselves. Will we need to go back to paper time cards then enter into PS?
    - Carlos answered: Development of an electronic timesheet is being worked on (currently in proof of concept stage) to roll out to departments.
  - Q5 How long will access to DEFINE after PS go-live date?
    - Jacq answered: access to do what?
      - We were told it would only be “view”, is that the case?
        - Yes, that’s the way it’s going. They are trying to restrict us to a small set of individuals, about 100, who can access DEFINE and work once PS goes live. This will only be for 15 mos. We understand it’s a big transaction.
        - DEFINE will be shut off?
          - Yes for the whole UTSA. Only a small set of people, 40 to 100, will have access. Everyone else will
Q6 Will historical data be removed from UTDirect? If not, where will it be for adhoc reporting?
   ✓ Carlos answered: Limited access will be given on March 1 according to security access you will be given.

Q7 Will Fiscal deadlines be pushed back or be on schedule?
   ✓ All deadlines will be on schedule.

- Asked if there were any more questions and there were none.

Change Management Lead - Kari

- Continued the call by proceeding to the next slide, Integrated Change Management & Project Management at UTSA.
- She explained the activities that will be continued pre go-live, go-live, post go-live. We are in pre go-live now. We will have previews of PeopleSoft as they are being developed. There will be training for manual workarounds and working in PeopleSoft. There will be campus wide communications and trainings for go-live and Sequence 1. Sequence 1 will be enforcing what people have learned and what new functionality will be go-live.
- Post go-live, follow up, focus groups, training, online mechanisms, looking for usage matrix in PeopleSoft and help desk. How much help is needed.
- This will give us an understanding of what people need in support of these changes and go-live. Kari encouraged Change Leaders to share with their staff as best as can. Continue to send questions and address them to her as she is the Change Management lead.
- Informed she will share with them the results of the focus groups. Plans for doing this will be in August. Gave them a snippet of what the findings were.
- Opened up for any last questions over the phone or through the chat function on line.

   ✓ Approximately when will we have an idea of what a chart of accounts look like?
   ✓ Rene answered: we are looking at what the chart will look like and we will be having it get out for Fiscal 14. It will be coming out this fall. Chart of Accounts document and standards will be released during Fiscal year 2014. There will be a formal training regarding the COA.

- No more questions in regards to this conference call and the information that was given. Kari asked the last question to everyone. She asked for their opinions if the format of a conference call and using the online format was a good way to meet or do they prefer face to face meeting? Kari stated she is happy to meet in this format.
- There were several comments that came through the online chat stating this format was a great way to meet.
- Closed the conference call with thanking them for their attendance and accommodation of the short notice for the conference call. She assured them that the Change Management team will be sending them any information as it comes available.