UTSA Change Leaders Meeting

UTShare PeopleSoft
Change Leader Meeting
October 2013
Agenda

• Change Leaders: Managing Expectations
• Current UTShare and UTSA PeopleSoft Project Update
• Preview to Chart of Accounts
• PeopleSoft Training at UTSA
• Interim Workflow Approval Processes
• PeopleSoft Support and Sustainment Center (PSSC)
• Questions / Next Steps
Change Leaders
Managing Expectations

Kari Peterson
Change Management Lead
1. Prepare your department and set the stage for change. Communication is paramount when trying to raise the level of understanding in your department or areas.

2. There is no substitute for personal, interactive communication to inspire people to act and embrace a change.

3. **Action:** Present the PeopleSoft project update, answers questions, and manage expectations for change:
   - Meet with your Department leadership and department staff; 73% of people engaged in transformational change initiatives prefer to receive information face-to-face and in small groups *(Source: PROSCI – 2005 benchmarking study)*.
   - Provide information and handouts on the PeopleSoft Support & Sustainment Center for departments questions about PeopleSoft.
   - **Elicit feedback** to better understand how our message was received.
   - Reach out to the PeopleSoft Change Management lead with Change Management questions or concerns. (UTShare@utsa.edu)
Communications for PeopleSoft Alignment at UTSA

The “Cascading“ approach builds Trust, Awareness, and Visibility; provides mechanisms for feedback and questions ensuring overall PeopleSoft Implementation Adoption and change in organizational behaviors.

<table>
<thead>
<tr>
<th>Level</th>
<th>Responsibilities</th>
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<tbody>
<tr>
<td>Executive Sponsor</td>
<td>Program Kick-Off, Mid-Point, Transformation, Project introduction across UT System</td>
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<tr>
<td>Executive Committee</td>
<td>Mission, Vision, Goals, Town hall meetings</td>
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<tr>
<td>Director-Level (AVP’s)</td>
<td>Objectives, Outcomes, Team Meetings, Campus-wide messages, Individual</td>
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<tr>
<td>Manager-Level (Change Leaders, Project Managers, Back &amp; Front Office)</td>
<td>Behavior, Change is Here, Team Meetings, Campus-wide messages, Individual</td>
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<tr>
<td>Staff, Faculty, Associates</td>
<td>What’s in it for Me?, Why Now, What do I do Next?</td>
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PeopleSoft Support & Sustainment, Feedback Mechanisms, Measurement
Current UTShare & UTSA Project Status

as of October 21\textsuperscript{st}

Jacquelyn Kyle, Project Director
Phased PeopleSoft Go-Live

Current Focus ➤

Mar 2014

Initial Go-Live

Core HCM & FMS Functionality
Recruiting/Candidate Gateway
Hyperion Budgeting & Planning

July – August 2014

Sequence 1

Workflow for:
Purchasing Travel & Expense
Budget Transfers
Time & Labor and Absence (Pilot)

August - September 2014

Sequence 2

Remaining Workflow for:
Time & Labor and Absence
(Remaining Depts)

Limited ESS / Workflow
• View/Edit Personal Data
• View Work Schedule
• View Paycheck
• Add/Edit Direct Deposit
• Add/Edit W4 Tax Info
• Recruiting / Candidate Gateway (External)
• Apply ESS (Internal Candidates)
• Consolidated Position Budgeting and Workflow

Interim Approval Workflow Processes

MSS & Workflow Approval
Purchasing Decentralized
Travel & Expense Decentralized
Budgeting Decentralized
Position Management Decentralized
Recruiting Decentralized
Hiring/Employment
T&L/ABM PILOT
(1-2 Departments per Campus)

ESS / MSS & Workflow Approval
• Request Absence
• Enter Time Report
• Related ESS/MSS Functionality

Fully Deployed to All Departments

Legend:
ESS – Employee Self-Service
MSS – Manager Self-Service
Current UTShare & UTSA Project Status

- UT Austin selected **Workday** as the new software to replace DEFINE and are currently in planning stages for the implementation project. DEFINE and related systems supporting UT will be retired when their new system goes live. UTShare campuses will proceed forward as planned with their implementation of PeopleSoft.

- UTShare PeopleSoft project is tracking at **54% of 71%** for remaining tasks on the rebased project plan created June 2013 for a March 1, 2014 go-live.

  - Campuses are in 10th iteration of conversion validation of HR DEFINE data in PeopleSoft and loading/posting August FY13 G/L (General Ledger) balances.

  - Integration testing (Round 1) uncovered several issues in PeopleSoft’s Human Capital Management (HCM) and Financial Management System (FMS) that will require manual workarounds for the March 1st go-live.

  - Integration testing (Round 2) as parallel is planned for November using Sept 30th DEFINE converted data.
Expected Go-Live Transition at UTSA

- UTShare PeopleSoft initial go-live for March 2014 is expected to be difficult and tough. Central Processing areas (Back Offices) will be initially faced with challenges due to manual clean-up of data anomalies from DEFINE conversion and manual workaround processes determined during testing.

- PeopleSoft Training roll-out at UTSA to start during January 2014.

- Implementation of *interim* Approval Workflow processes at UTSA until PeopleSoft’s Approval Workflows are deployed later in 2014.

- UTSA’s **PeopleSoft Support and Sustainment Center (PSSC)** will be fully operational March 1st to provide **Campus personnel a Single Point of Contact (SPOC)** for questions regarding PeopleSoft.

- While transition from DEFINE to PeopleSoft will be challenging, it will ultimately benefit and support UTSA’s journey to Tier One status due to better data management and analytical reporting capabilities in PeopleSoft.
Preview to Chart of Accounts

Rene Paniagua
Objectives

• Preview the UTShare Chart of Account Structure as it correlates to DEFINE Account Structure

• Preview a Speedchart/Speedtype and its function in UTShare

• Preview how departments will crosswalk their DEFINE Account to the new UTShare Accounting Information
UTSA Financial Accounting Chartfield Structure

Component Code
- Specifies Institution

Unit Code
- Detailed Breakdown of institution
- Organizational Structures

Budget Group
- Informally Account Number
- Group transactions together for a particular purpose(s) or funding

Grants/Projects

Fund Group
- (Fund Code)
- Indicate a specific Activity

Object Code
- No DEFINE Equivalent

NACUBO
- Source of Funds

National Association of College and University Business Officers Reporting Code

Business Unit
- (Set ID)

Department ID
- (DEPTID)

Cost Center

Project ID

Activity

Fund

Account

Function
UTShare

Business Unit UTSA1

- Fund
- Account
- Function
- Dept ID
- Cost Center
- Project ID
- Activity

UTShare defined values
Used by All UTShare institutions

UTSA defined values
Campus Specific

Version Date: 10/2013
Terminology

- **SpeedChart**: Shortcut that populates data into the financial accounting lines for Accounts Payable and Purchasing.

- **Speedtype**: Shortcut that populates data into a Chartfield String in the General Ledger.
SpeedChart & Chartfield String

Cost Center SpeedChart = Cost Center
defaults to full chartfield string comprised of:
Fund + Function + Dept ID + Cost Center
- or-

Project SpeedChart = Project
defaults to full chartfield string for:
Fund + Function + Dept ID + Project Activity
How to Find Account Crosswalks - a look into UTShare
PeopleSoft Training at UTSA

Magdalena Torres Foley
1. 13 UTSA PeopleSoft training courses currently under development.

2. Conducting training course prototype presentations with pilot groups for finalizing the training content development for the UTSA Go-live.

3. Preparing “Quick reference” guides of key PeopleSoft tasks for end-user support.

4. Release of PeopleSoft training course schedule to be published in December with course dates, times and locations. So stay tuned!

See it now! Video introduction to the PeopleSoft system. The first in the series called “The Look & Feel of UTShare”. Provided to Back Office and Change Leaders in August; Front Office in mid-September. [http://utsa.edu/utshare/Training/Modules/ESS](http://utsa.edu/utshare/Training/Modules/ESS)
Introduction to Interim Workflow Approval Processes at UTSA

Carlos Gonzales
Phased PeopleSoft Go-Live

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Interim Approval Workflow Processes

Project Closure
PeopleSoft Interim Workflow Approvals at UTSA

PeopleSoft’s delivered Approval Workflow across UTShare institutions will likely exceed the existing capacity of the UTShare infrastructure. UTShare’s decision to “phase-in” the approvals will ensure volume issues are adequately addressed.

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<tr>
<th>HCM Workarounds (to date)</th>
<th>FMS Workarounds (to date)</th>
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<tr>
<td>• Hire/Rehire</td>
<td>• Travel Authorization</td>
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<tr>
<td>• Job Record Change</td>
<td>• Requisitions</td>
</tr>
<tr>
<td>• Pay Rate Change</td>
<td>• GL Approval <em>(Back Office only)</em></td>
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<tr>
<td>• Exempt Timesheet <em>(pending review)</em></td>
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<tr>
<td>• Non-Exempt Timesheet <em>(pending review)</em></td>
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UTSA PeopleSoft will automate manual interim workflow approval workarounds using SharePoint software. Additional manual interim workflow approval workarounds will be processed with paper copy.

**Workaround Approach**

- Leverage Institution Sharepoint 2010 technology capabilities
- Mirror PeopleSoft as closely as possible to reduce training duplicity and retain familiarity.
- Keep it simple, reliable and repeatable

**Current Development Status**

- Indicated forms are nearing 90% completion
- Workflow routing is around 90% complete
- Test site for Change Leaders (will be available in Jan. 2014)
UTSA PeopleSoft Support and Sustainment Center

Single Point of Contact

Cindy Orth
Director of DEFINE Administrative Services
PeopleSoft Support & Sustainment Center at UTSA

The PeopleSoft Support and Sustainment Center (PSSC) is the single point of contact (SPOC) for end users of administrative applications at UTSA.

PSSC to provide support to UTSA PeopleSoft end-users:

• 5 days/week, 8:00 AM – 5:00 PM
• Staffed by team of 19 including:
  ✓ Customer Support Team Members
  ✓ Subject matter experts; technical, functional, data, and training leads
• Systematic method in-place for tracking and managing issues:
  • PeopleSoft application issues, system access and approval security
  • Business process changes
  • PeopleSoft training

Support includes escalating system issues to UTShare Shared Services Staff:

• Performance issues
• Functional and technical configuration issues
• Reporting database issues
• Security roles and permission list issues, and Portal issues
Many decisions are still in the process of being worked out.

Due to the phased, sequenced roll-out of PeopleSoft Approval Workflow, final development of PeopleSoft workflow is not complete and decisions for this are still under consideration.

Interim processes for Approval Workflow are being considered to support the phased, roll-out of PeopleSoft’s Approval Workflow.

Integration testing of PeopleSoft continues to determine Interim processes; Processes are subject to change.

Information will be conveyed when validated and approved.
Contacting the PeopleSoft Support and Sustainment Center – Single Point of Contact

- **Call** the PSSC at **458-SPOC (7762)**
- **Visit** the UTShare Website, click on the SPOC icon
- [http://www.utsa.edu/utshare/](http://www.utsa.edu/utshare/)
- **Email** PSSC: spoc@utsa.edu
Closing

• Questions?

• Next meeting
  o November 21st, 10:30-11:30 AM
  o Location: Webinar, Conference Call

• For more information:
  o Call the PSSC at 458-SPOC (7762)
  o Visit the UTShare Website, click on http://www.utsa.edu/utshare/
  o Email PSSC: spoc@utsa.edu

Thank You for your Participation