UTSA Change Leaders Meeting

Dial-In: 619-326-2772
Code: 6672273#

UTShare/PeopleSoft
February 20, 2014

Please place phone on Mute.
We will begin at approximately 3:00 pm.
Questions about the Webinar: veronica.guerrero@utsa.edu
Webinar instructions for asking questions:

Use the “Question” pane in the upper right corner of the webinar screen to reach us for:

- Discussion
- Questions
- *6 to Mute/Unmute your phone during Q&A

Project Leads:

Magdalena Torres Foley – Change Management/Training Lead
Jacquelyn Kyle – Project Manager
Carlos Gonzales – Technical Lead
Rene Paniagua – FMS Lead
Doug Hartzler – HCM Lead
Cindy Orth – PeopleSoft Support, Director of DEFINE Admin. Services

Web Moderator: Veronica Guerrero – Change Management
Agenda

• UTShare/PeopleSoft Project Update
• UTShare/PeopleSoft Training Update
• What to Expect in March & April
• Questions & Answers
UTShare/PeopleSoft Project Update

Jacquelyn Kyle
Project Manager

Status as of February 20, 2014
UTShare/PeopleSoft Project Update

- Go-Live is scheduled for May 1\textsuperscript{st}, 2014.
  - Conversion from DEFINE to UTShare/PeopleSoft will occur from May 1\textsuperscript{st} – May 12\textsuperscript{th}.
  - UTSA Campus login to UTShare/PeopleSoft starts May 13\textsuperscript{th}.

- A cutover plan is being developed for the transition to UTShare/PeopleSoft that builds the schedule of processes that will close out our transactions into DEFINE/UT Direct – PointPlus & HRMS.
  - UTSA’s cutover dates will be distributed in late March, early April.
UTShare/PeopleSoft Project Update

- Interim workflow approval processes will be used until UTShare/PeopleSoft’s automated approval functionality is made available later this year.

- UTSA’s UTShare/PeopleSoft Interim Solutions for forms and workflow (routing) will be used for the following processes:
  - Personnel and Position Requests
  - Timesheets
  - Travel Authorizations
  - Non PO Vouchers
  - Expense Reimbursements
  - Requisitions for Purchase Orders
Revised Deployment Plan, May 1st Go-Live

**May 2014**
- Initial Go-Live
- Core HCM & FMS Functionality
  - Recruiting/Candidate Gateway
  - Hyperion Budgeting & Planning

**Sept – Oct 2014**
- Sequence 1
  - Workflow for:
    - Purchasing
    - Travel & Expense
    - Budget Transfers
    - Time & Labor and Absence (Pilot)

**TBD Nov – Feb 2015**
- Sequence 2
- Remaining Workflow for:
  - Time & Labor and Absence (Remaining Depts)

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**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

**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
UTShare/PeopleSoft

Training Update

Magdalena Torres Foley
Change Management/Training Lead
UTShare/PeopleSoft Training Update

- Training began on February 10, 2014 with classes being offered at both Main and Downtown campuses.

- UTShare/PeopleSoft classes address the processing of Human Resources, Financial and Purchasing transactions.

- A special edition of the UTShare/PeopleSoft Training Newsletter & Schedule was delivered to all employees on February 14, 2014.
UTShare/PeopleSoft Training Courses

Administrative staff are encouraged to complete the following courses:

- PS 200.01 Introduction to UTShare/PeopleSoft
- PS 201.01 Introduction to the Chart of Accounts (COA)
- PS 202.01 Purchasing Goods & Services
- PS 203.01 Processing Non-Purchase Order Vouchers
- PS 204.01 Processing Travel Advances and Reimbursements
- PS 205.01 Managing Departmental Expense & Revenue Budgets
- PS 207.01 Statement of Accounts (SOA)
- PS 208.01 Procard Processing Using UTShare
- *PS 301.01 Funding Positions
- *PS 302.01 Personnel Action & Position Processing (Interim Process)

* Invitations will be sent from the prospective departments (Human Resources, Payroll and Budget Planning & Development)
UTShare/PeopleSoft Training Courses

Employees are encouraged to complete the following courses related to their job duties.

Department Timekeepers:
  * PS 300.01 UTShare/PeopleSoft Timekeepers Time and Absence Reporting

Managers & Supervisors:
  IP 400.01 Time & Absence Approvals for Supervisors (Interim Process)
  IP 401.01 Approval Process Overview for Managers & Supervisors (Interim Process)

All Employees:
  PS 100.01 Employee Self Service (ESS) online
  * IP 303.01 Time & Absence Reporting for Exempt Employees (Interim Process)
  * IP 304.01 Time & Absence Reporting for Non-Exempt Employees (Interim Process)

*Invitations will be sent from the prospective departments (Human Resources, Payroll and Budget Planning & Development)
What to Expect in March & April

Douglas Hartzler
HCM Lead

Rene Paniagua
FMS Lead
What to Expect in March & April

• Look for Information and guidance on transitioning to UTShare/PeopleSoft:
  ➢ “Guide for Transition to UTShare/PeopleSoft”
  ➢ Cutover schedule and dates from DEFINE. There will be various cutoff dates, similar to a year end schedule.

• Open Forums on UTShare/PeopleSoft will be held March 18th and 27th
  ➢ Review of key transition points
  ➢ Opportunity for question and answer

• Finalize HR, Financial, and Purchasing transactions in DEFINE according to cutover schedule
What to Expect in March & April

• Department prepare for transition to UTShare/PeopleSoft:
  ➢ Employees and timekeepers prepare to use the new forms and procedures starting in May
  ➢ Familiarization with interim processing forms and workflows (routing) on UTSA’s UTShare Interim Solutions

• Respond to information requests from the project office:
  ➢ ProCard reconciler(s), approver(s), and account(s) for each card holder
  ➢ Review and validate security authorizations for each department
Questions & Answers
For UTShare/PeopleSoft questions, contact:

- **Call** the PeopleSoft Support and Sustainment Center (PSSC) at **458-SPOC (7762)**

- **Visit** the UTShare Website, click on the SPOC icon [http://www.utsa.edu/utshare/](http://www.utsa.edu/utshare/)

For policy specific or business process related questions, contact the **Human Resources, Finance or Purchasing departments**.