UTSA Change Leaders Meeting
UTShare/PeopleSoft

June 26, 2014
MH Building 2.01.40
2:00 – 3:30 pm
Agenda

- Welcome
- Guest Speaker: Kay Wakeham
  - Dealing with Resistance to Change in the Workplace
- PeopleSoft Support & Sustainment Center (PSSC)
  - Key Topics
- Change Leader Q & A Session
- Change Leader Appreciation
- Next steps/Closing
Dealing with Resistance to Change in the Workplace

Kay Wakeham, MBA, SPHR
Director Strategic HR, Performance
PeopleSoft Support & Sustainment Center (PSSC): Key Topics

Magdalena Torres Foley
UTShare/PeopleSoft Project
Lifecycle Resource

Expectations for an end-user experience during the UTShare/PeopleSoft project lifecycle

Transition
1st year
May, 2014...

Stabilization
2-3 years

Optimization
3-5 years
Since Go-Live, it’s been challenging and at times overwhelming.

Despite initial hurdles i.e. security, interim processes and familiarization with PeopleSoft, UTSA is collectively making progress with changing to a new system.
PSSC Overview

Tools and resources to assist with the PeopleSoft transition:

- PSSC Helpful Tips Webinars
- Walk-in Labs
- How to Guides
- UTShare Website
- Training Courses
Human Capital Management (HCM)

- HCM Key Points:

1. The *Owning* Department is responsible for both position funding and time entry, not the funding unit.

2. Access to the *Department Admin* tab for doing position is granted by delegation from the reports to supervisor

3. Lack of Department Reports
Financial Management Systems (FMS)

- FMS Key Points:

  1. Determine Budget Balances in PeopleSoft is very different than the Define system.

  2. FY2015 Purchase Orders process has not been fully defined in PeopleSoft.

  3. Interim Workflow Approval Solutions need to be processed before entering into PeopleSoft.
Training

- Training Key Points:

  1. Need for more training job aids.

  2. The Statement of Accounts course is in development.
PSSC Key Points:

1. Back log of SPOC tickets, email, and phone calls.
   - Will reply as quickly as possible.

2. To better serve the campuses utilize the two methods of communication:
   - Phone – Ext.7762
   - Create a SPOC Ticket
3. SharePoint Concerns:
   - Documents not routing to correct budget authority
     - Must notify SPOC of signature changes when employees leave and update with replacements. This is a manual process.
     - Important to have multiple signers in the event of absence or vacation.
     - If document does not arrive in the email inbox of recipient, creator can go to the Interim Workflow Solutions form.
PeopleSoft Support & Sustainment Center (PSSC)

For Help:

- **Call** the PeopleSoft Support and Sustainment Center (PSSC) at **458-SPOC (7762)**
- **Submit** a SPOC ticket (one question per ticket)
- **Visit** the UTShare website: [ww.utsa.edu/utshare](http://ww.utsa.edu/utshare)

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

- Jacque Kyle - Project Manager
- Rene Paniagua - FMS Suite Lead
- Doug Hartzler - HCM Suite Lead
- Cindy Orth – Campus Administrative Support
- Carlos Gonzales - Technical Lead
- Magdalena Torres Foley – Change Management & Training Lead
Thank you
Change Leaders
Change Leaders

Recognitions

Thank you!
What’s next for Change Management

Magdalena Torres Foley
Change Management & Training Lead
What’s next?

Support Campus use of PeopleSoft

- Continue with Active Outreach:
  - Meet with your department leadership and staff
  - Be proactive with providing answers to end user questions.
  - Share tools and resources that assist with using PeopleSoft.
  - Utilize the Change Management resources.
  - Attend meetings and webinars.
What’s new?

- Since we are operational with PeopleSoft, smaller **User Groups** are needed to help the UTSA community gain the most value from the PeopleSoft System.

- Change Leader meeting frequency will be held on an as needed basis but Change Leaders communications will continue.
Thank You!