Presenters

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Agenda

I. Introduction
II. Overview of Campus Support
III. Needs/Wants from PeopleSoft
IV. Questions
Why Are We Here?

To make recommendations for enhancements to PeopleSoft and associated business processes.

• Improve usability for department users
• Actualize the capabilities of PeopleSoft
UTShare
Shared Information Services
UT Shared Services

UT Shared Services is the collaborative effort of the 15 U. T. System institutions sharing systems, services, contracts, etc. with the long term goal to reduce operational overhead costs for each institution.
UTShare PeopleSoft

- PeopleSoft is a U. T. Shared Services collaborative effort of six U. T. System institutions, plus U. T. System Administration, implementation of Oracle’s PeopleSoft to replace DEFINE, a U. T. Austin legacy system.

- PeopleSoft has two applications suites:
  - Human Capital Management (HCM)
  - Financial Management System (FMS)
Timeline

PeopleSoft GoLive: May 1, 2014

Transition 1st year

Budget Tool

Stabilization 2-3 years

PS Version Upgrade

Data Warehouse

Optimization 3-5 years

September 2015

PS Version Upgrade
PeopleSoft Support & Sustainment Center
Core Services provided by the PSSC include:

- End user support
- PeopleSoft security administration and access control
- Application technical support
- Project Management

Shared Support Services with Back Offices
(Financial Affairs, Human Resources, Research Administration):
- Application Support
- Report writing and distribution
- Campus Representative to UT System Shared Information Services
UTShare at UTSA Website

http://www.utsa.edu/utshare/

Update on the Implementation of UTShare/PeopleSoft

TO: UTSA Faculty and Staff

FROM: Kathryn Fink-Baxter, Vice President for Business Affairs

DATE: Aug. 26, 2015

SUBJECT: Update on the Implementation of UTShare/PeopleSoft

In my last update to the campus, we announced that a special team was mobilized and a tool was being developed to assist departments with their monthly reconciliation reports. As many of you know, one of the difficulties with our new accounting system is the ability to have an effective, yet simple tool for monthly reconciliations and resolving errors. The Assistant VP/Controller, with assistance from Compliance, GISPA, and PSSC, hired several accounting professionals who have been meeting with departments to assist with the monthly reconciliations. I want to congratulate the many departments who were part of our success story this month. The Laboratory Animals Resource Center (LARC) and Interdisciplinary Learning Teaching (LIT) collaborated and successfully reconciled their accounts. They were grateful for the training which helped them understand terminology. To date, 44 departments have met with the teams; another 24 are scheduled to receive assistance.

For those still in need of assistance, please contact Linda Martinez at 458-6914 for an appointment with a team member.

Another campus accomplishment, according to the UT System tracking, is our 70% data surge project cleanup completion, which was focused on PeopleSoft Grants and Contracts functionalities.

In addition, we have made progress leading and testing salary encumbrances. For FY 2016, we expect a significant improvement in the ability of departments to track available and uncommitted balances for cost centers. We believe that we have been able to resolve nearly 94% of all the FY 2014 purchase order roll forward encumbrances and we have increased confidence that the FY 2015 roll forward purchase order processes will be easier for the campus. Our team is working very hard over the next month to close the fiscal year.
Tip!

UTShare Dashboard

**PeopleSoft Resources**
- UTShare/PeopleSoft
- Interim Workflow Solutions
- Status and Alerts
- **Security Request Forms**
- Single Sign-on Test Utility
- Control-M Self Service
- PeopleSoft QA Portal
- PeopleSoft SBX Portal

**Support Resources**
- SPOC - Ticketing System
- UTShare at UTSA
- HCM - User Productivity Kit
- FMS - User Productivity Kit
- Kayako Staff Access
- ServiceNow

**Department Resources**
- Budget Website
- Financial Affairs Forms/Worksheets
- Human Resources Forms
- PSSC SharePoint Site

**Reporting Resources**
- HCM Reporting Environment
- FMS Reporting Environment
Benefits of Creating a SPOC Ticket

- Responses provided by multiple staff
- Verification/notification
- Track statistics to provide better services to our campus community
Typical Support Requests

• Security
  – Access to PeopleSoft
  – Access changes due to transfers or new job duties

• Technical
  – Issues with browsers
  – Interim Workflow Solutions Forms support

• Application Support
  – Assist end users with preparation of documents
  – Troubleshoot errors encountered during document creation
  – Understanding PeopleSoft page navigation
PSSC Help Desk Support

PSSC Help Desk resolves issues and concerns from campus customers.

SPOC tickets and Calls received from May 1, 2014 to August 31, 2015

SPOC Tickets  5,579
SPOC Calls      4,202
Total          9,781

Graph period is Sept 2014 – August 2015
The SPOTLIGHT

Monthly newsletters are located at:
www.utsa.edu/utshare/
Help Us Help You

Use Skype for Business

PSSC assists end users with PeopleSoft and Interim Workflow Solutions by viewing your desktop and troubleshooting issues.

Formerly called “Lync”

Contact OIT to install on your workstation
What do you need/want from PeopleSoft to better do your job?
Ground Rules

- Write down your recommendations

- Go around the room and verbally state your top response to each question.

- Concerns and recommendations will be summarized and shared with the campus on the PSSC website at the end of departmental meetings.
Needs/wants from PeopleSoft

1. What are your concerns or recommendations:
   
a) to improve administrative processing?

b) to improve PeopleSoft usability?
Needs/wants from PeopleSoft

2. What could UTSA Back Offices do to better support you?

3. What training or reference materials do you need?
   a) On-line
   b) Self Help
   c) Classroom
Needs/wants from PeopleSoft

4. What PeopleSoft access do you need to do your job (that you do not already have)?

5. What reports or data extracts do you need to do your job (that you do not already have)?
Needs/wants from PeopleSoft

6. What information do you search for on the UTSA UTShare website?
   a) What improvements do you recommend for this website?

7. Which other websites do you search for information regarding administrative processes and PeopleSoft?
   a) What improvements do you recommend?
8. How could UTSA improve its Change Management practices to communicate changes and enhancements to the campus community?

9. What topics would you like to see in future webinars?
Timeline

- **December 18th** — Deadline to submit responses
- **January 2016** — Collaborate with Back Offices to evaluate and prioritize
- **February 2016** — Summary of Findings and Recommendations
- **March 2016** — Summary of Action Plan
Questions
Thank you!