# Meeting Discussion

**Review of UTSA Go-Live cutover schedule and milestone dates** (handout)

- May 1 is not official Go-Live date for UTSA, but when UTSA officially begins transition to PeopleSoft.
- All other campuses are Going Live May 5, but UTSA will Go Live May 12th.
  - UTSA will do Conversion and Security validation from May 5 to May 12.
- HCM has had automated conversion, with data cleanup afterwards. FMS manually converted data via spreadsheets.
- DEFINE’s last Payroll will run May 5-6th.

**UTSA Project Update**

- **Executive Committee (EC) Update**
  - FMS had their “soft” Go-Live April 21st.
  - UTEP appointed to take lead on final Payroll Testing and related FMS integration and interfaces.
    - Testing continues and will continue until Go-Live.
  - UTSA’s 10 Check Printing testing are still being reviewed.
  - Currently ARDC is prioritizing campus submitted testing issue tickets (IMTs).
  - The EC agreed a $250/10% tolerance for 3-way Matching Rules of Purchase Order (PO), Goods Receipt, and Invoice amounts is to be made to FMS before Go-Live.
    - 3-way Matching rule tolerance variances prevent excessive exception errors between PO, Goods Receipt and Invoice on payable amount that slow down processing of vendor payments.
  - UTSA requested assistance to manually correct approximately 7,000 payroll balances expected not convert accurately from DEFINE for our employees.
    - Dr. Kelley agreed that UTShare will provide assistance for data entry support to this effort.

- **HCM Update**
  - Project team testing of Payroll processing is complete.
  - For March testing, 58% of checks are accurate to within $1 dollar.
    - End goal is 100% accuracy for employee checks.
  - Per Javier Martinez, Payroll module’s functionality is good, but input from other modules (job record data, benefits data, etc.) is where there are areas for potential error.
  - Payroll integration with G/L and Accounts Payable still requires testing.

- **FMS Update**
  - For April 21st FMS Back-office Go Live, Project Team ensured security was valid for key Back-Office staff.
  - Identified staff to do dual entry (entry in DEFINE and PeopleSoft production).
    - Data entry into PeopleSoft production for open PO’s, Travel Authorizations and Vouchers will begin May 5th.
  - Elisabeth Cuadros is entering DEFINE Travel Authorizations for June into PeopleSoft production, but is just saving them, not budget checking.
  - Testing of Banner interface (pre-production and post-production) continues.
  - Ensuring DEFINE codes are changed to PeopleSoft speedtypes, so that May 1 new speedtypes are referenced.
  - New A/P interface was created to eliminate double entry for “Voyager,” Library’s purchasing system.
  - Finance processes, such as General Ledger and AP vouchers, have not been tested with Payroll.
    - However, worst case scenario, the process can be made to work with manual effort.
**Technical Update**
- Currently 2 remaining IMTs relating to technical problems needing resolution. Resolutions should be reached.
- Scheduling UTSA's 20 local interfaces for synchronization with UTSA OIT and ARDC process schedules.
- System-wide there are approximately 100 interfaces to/from UTShare/PeopleSoft, which are currently being finalized.
- Many DEFINE processes are being phased out. Timing of phase out is dependent upon DEFINE’s process schedule for last time runs.
- SharePoint Interim Workflow Solutions for production is finalized; all previous OIT issues have been resolved.
- UTSA’s UTShare project website is set up for the various production links to be to be released on May 12th and 13th.
- Clarified with UTSA’s Security Office that the cyber-security issue for Internet Explorer should be okay for internal software (PeopleSoft/SharePoint), but there are potential threats for external sites outside of UTSA.
- Conducting final training of PSSC team in preparation for campus-wide support on May 12th/13th.
  - SPOC questions/calls have been occurring for a month and have been addressed timely.

**Training Update**
- Video recording of UTSA core PeopleSoft classes are complete; this will help with the teaching load of Teaching SMEs.
  - After review of pending items, videos will be posted to UTShare website.
- UPK development for PeopleSoft Procard course is complete. All UTSA classes now have customized UPKs for training.
  - UTSA is only campus who used UPK tool to aid training.
- Drop-In labs for core classes (e.g., Timekeepers) are being scheduled.

**Change Management**
- The live stream of the Open Forum for Downtown campus went well.
- Continue utilizing Change Leaders to proliferate information.
- There are plans for specialized crosswalks for departments.
- Working on an announcement of Interim Workflow Solutions using SharePoint.
- Developing a 1 page item on “What to Do for Day One.”

**Questions**

1. **When is first close for May in PeopleSoft?**
   a. Same schedule in DEFINE → June 5, (five working days).

2. **When will Admin staff begin entering timesheets for Payroll in PeopleSoft?**
   a. May 12th.

3. **Why are some current employees who are paid bi-weekly now being paid monthly in PeopleSoft?**
   a. Non-exempt, non-benefits eligible employees must be paid monthly in PeopleSoft so balances are accrued correctly.

4. **Has the GA/TA students’ issue of Thanksgiving holiday pay been addressed?**
   a. Yes. HR will be sending out a memo detailing exactly how to handle these types of students.

5. **How was PeopleSoft access security determined?**
   a. PeopleSoft access was as closely aligned to the description of employee’s current access in DEFINE as possible.
   b. PeopleSoft security roles will be analyzed again later this summer once PeopleSoft transition settles.

6. **Whose responsibility is it to assign security roles in PeopleSoft?**

7. **When will PeopleSoft’s automated workflow be in place?**
   a. Tentatively, next Spring.

8. **How much can UTSA see other campuses’ data?**
   a. Bit fuzzy. Still being tested.
   b. Data associated with a campus’ Set ID shouldn’t be visible, nor should data at the employee level.

9. **How does an employee know if they are a “Super User” with post go-live view access in DEFINE?**
   a. Employees with the “University Affiliate – 0%” assignment have view access to DEFINE.
   b. Post go-live DEFINE access is no longer assigned with a “Super Users” approach limited to less to 100 per campus; instead, UT Austin expanded the role, and now ~598 UTSA employees will have post go-live view access to DEFINE.
10. How long does the PO freeze last?
   a. The PO freeze lasts until May 13th.

11. Was the goal for training attendance met?
   a. Training continues until end of May, but currently it looks like training attendance goal has been exceeded.

12. What are the main concerns of the campus?
   a. Core areas of concern:
      i. What to Do on Day One?
      ii. How to access PeopleSoft, announcements (where do we go?)
      iii. Tips of Day (How To’s)
      iv. System availability, etc.

13. Are FAQs being expanded?
   a. Yes. All FAQs are in the Sustainment Center’s Knowledgebase, accessible via UTSA’s UTShare/PeopleSoft website. Currently, there are around 300 FAQs.