Steering Committee Meeting
October 27, 2014

Action Items

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Assigned to</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Develop list of issues to take to the OC Meeting.</td>
<td>Doug, Corey</td>
<td>11/3/14</td>
</tr>
<tr>
<td>2. Develop a list of tasks/modifications that can be resolved in a shorter timeframe before they become larger issues and recommend those enhancements to Shared Services, UTShare OC, and UTShare EC for action.</td>
<td>Back Office, PSSC</td>
<td>Periodic</td>
</tr>
</tbody>
</table>

Meeting Discussion

1. **Current Status and Challenges**
   - Accomplishments in the past quarter include deployment of labor distribution reports, contract pay, and annual benefits enrollment. Maintenance of contract pay and benefits will be on-going.
   - FY 14 fiscal year close and statement of accounts still in progress.
   - Numerous reports must still be validated.

   - **Help Desk Report**
     - PS Help Desk averaging close to 300 tickets per month and 150 calls per month since fiscal year start.
     - Department administrative staffs continue to use to job aids and references posted on the campus UTShare website.
     - Update of the Knowledge Base is ongoing. The Knowledge Base Q&A’s is reviewed on a regular basis with information updated to match current activities. References to DEFINE activity will be parsed out over time.

   - **Transition to Sustainment**
     - Training responsibility has now shifted to respective back offices.
     - Change management has been discontinued, and communication will come from respective offices.
     - Campus administrative staff support will focus with the use of online tools, webinars, and job aides going forward to compliment help desk support.
     - Go forward campus support will be collaboration with PS Sustainment Center and back office. Process and policy questions will go to back office while how to and access questions will remain in the PSSC.
     - Campus PeopleSoft Consultants will roll off as follows:
       - Greg Daniel (FMS): 12/19/15
       - Susan Kriz (FMS): 1/30/15
       - Corey White (FMS): 1/30/15
       - Jack Welch (FMS): 2/27/15
       - Olga Hernandez (HCM): 3/31/15

   - **Staffing Changes/Challenges**
     - UTSA – PSSC currently has two open positions. Four positions will not be replaced now that the implementation project has ended. One position has been transferred over to Financial Affairs to support training.
     - Shared Service also has staffing challenges with 29 positions currently open.
     - A tight labor market exists for PeopleSoft positions- attracting and retaining employees will be challenging for both UTSA and Shared Services.
     - It was noted that UT Dallas chose to outsource PeopleSoft support. It is not known if UT System will evaluate a similar approach.

   - **Workflow**
     - Shared Services is hoping to support campus rollout of various FMS and HCM workflows heading into the new calendar year. Dates noted on handout is the expected timeline that Shared Services hopes to accomplish.
     - Work with Back Offices to test workflow and ensure the expected outcome is working as intended.
     - Workflow implementation is expected to roll out by area and considered a large project. UTSA will choose to roll out by area only after testing and training has been fully validated.

   - Overall campus frustration level remains high.
     - Achieving quick wins would improve confidence in the system.
Implementing items described in the non-compliant issues letter from the research community would also improve confidence in the system.

2. Shared Services Processing & Support
   - SSA incident: 427 active incidents, 100 logged by UTSA
   - Change Requests: 101 (pending development). The number of known change request has not changed since last meeting. Shared Services is developing a mechanism to better track change requests in The Service Now ticketing system.
   - UTShare Operating Committee
     - Advise EC on operational needs, review change requests and make recommendations, represent institutional interests, provide guidance
     - UTSA representatives are Lenora Chapman (FMS) and Barbara Centeno (HCM)
     - Developing roles and responsibilities, 3 meetings to date
     - Organizing user groups to replace functional committees (FMS and HCM)

3. Steering Committee Feedback and Questions from representative area
   - General topics of concern include statement of accounts, encumbrances, and workflow.
   - Faculty concerns include:
     - NTT faculty are not able to spread their salary.
     - Slow travel reimbursements experienced with system go-live. (This is resolved but contact DTS directly if a reimbursement is not processed timely)
     - Vendors not paid timely for purchased lab items (Contact DTS directly if an issue occurs)
     - Inability to see pay advice greater than 1 day before pay day in ESS
     - Full SSN is displayed on personal information summary page. Recommend last 4 of SSN only.
   - Institutional Research
     - Difficulty reporting on summer salary and salaries for NTT faculty
     - Shared CBM008 report not accurate
   - Provost Office
     - Lack of UTSA directory information such as room numbers and mail codes is creating challenges for students to find faculty and staff.
     - Inability to process travel authorization for faculty on paid development leave.
   - Research Community
     - Lack of statement of accounts
     - Salary and fringe benefits encumbrances not yet available
     - Interest being charged to sponsored projects when it should be charged to an institutional account
     - PO under tolerance rule causing excessive match exceptions
     - End date field on department budget table visible and causing confusion among campus staff (change request submitted)
     - Submitted change requests not scheduled for work (fixed cost collection for analysis type PAY, fixed invoices for multiple projects)
     - Need better solution to track salary cost transfers other than making direct entries on general ledger. The GL approach requires manual entry into eCRT for effort certification
     - Need additional queries/reports and more accurate data.
   - It was noted as a general observation that “low hanging fruit” (small or quick resolutions to items get lost in the Shared Services governance process). Need a balanced approach in resolving both small and large incidents and requested changes.

4. Upcoming Activities in Next Quarter (Nov – Jan)
   - FMS vendor patches/bundles and HCM tax update
   - Calendar year end processing (1099, W-2, reports)
   - Salary/fringe encumbrances
Statement of Accounts

Workflow Approval Processing –
  • UTSA will thoroughly test PeopleSoft Workflow before rolling out to our campus;
  • Interim approval processes will be retired based upon directives of Back Office areas;

eCRT validation and certification
Continued report development and validation
Continued system stabilization
Continued use of interim processes
Campus security procedures and review

Key Points
  • Staffing and prioritizing competing needs will be the biggest challenges
  • Focus will remain on system stabilization and back office processing next 3 months
  • 6-8 months to reach an equilibrium point

Questions

1. A. Do you have any way of knowing how many people are accessing the knowledge base? No, access is not tracked.
   B. Can you search by keyword? Yes
2. Are the open positions for Shared Services located at ARDC? Yes
3. What is an incident and who makes change requests?
   a. An incident is a system breakage.
   b. A change request is a planned change to the system. Both campuses and Shared Services staffs can initiate change requests.
4. Is there a way to renew change requests? Yes, by use of the escalation process through the campus project manager.