# UTSA PeopleSoft Steering Committee Meeting

**Steering Committee Attendees:**
Rebecca Anderson, Pamela Bacon, Barbara Centeno, Lenora Chapman, Jackie Hobson, Ken Pierce, Dr. Can Saygin, Rebekah Smith, Paul Tyler, Dr. Sandra Welch, Terry Wilson

**Project Team Attendees:**
Jacquelyn Kyle, Rene Paniagua, Carlos Gonzales, Douglas Hartzler, Cynthia Orth, Kari Peterson

**Minutes:** Joshua Schafner

## Agenda Items

<table>
<thead>
<tr>
<th>Topic</th>
<th>Time Allotted</th>
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<tbody>
<tr>
<td><strong>1. Steering Committee New Member Introductions</strong></td>
<td>5 minutes</td>
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<tr>
<td>Dr. Can Saygin, Research</td>
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<td>Rebecca Anderson, External Relations</td>
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<td>Kari Peterson, Change Management</td>
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<td><strong>2. UTShare Project Update</strong></td>
<td>30 minutes</td>
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<td>March 1st, 2014 Go-Live with 2 post go-live, sequenced deployments for approval workflow and self-service functionality</td>
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<td>Revised Deployment Plan Overview</td>
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<td>Project’s re-prioritized focus:</td>
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<td>- UTShare project management: depth, accountability, better execution, sustainability</td>
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<td>- Appointed Interim Assistant Director of Share Services, Sharon Helms</td>
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<td>- Hired a Technical Project Manager (Marcos Veloz), June 17th</td>
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<td>- Promoted Debra Brackens to new position as Manager of Client Services</td>
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<td>- Hire 11 new positions</td>
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<td>- Campus PMs and ARDC Shared Services Applications (SSA) Managers made a part of the PMO to increase access, visibility, transparency and accountability</td>
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<td>- Building revised Project Plan with key milestones and task monitoring</td>
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<td>- Restructuring of Functional Committees from module specific to business/process operation centric</td>
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<td>- Campus participation this summer: Security Validation, Conversion Validation, Interface Testing, Co-location SWAT teams</td>
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<td>- Data Center (ARDC): Conversion refresh from DEFINE May data across 34 environments, PTools upgrade</td>
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<td><strong>3. UTSA Project Team Current Activities</strong></td>
<td>20 minutes</td>
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<td>Technical - Security, Interfaces (programming and testing)</td>
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<td>FMS – Conversion Validation, Student refunds and Banner/PeopleSoft interface</td>
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<td>HCM – Conversion Validation, TRS interface</td>
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<td>Training</td>
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<td><strong>4. UTSA Change Management</strong></td>
<td>20 minutes</td>
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<td>Change Management reset for new Go-Live date March 1st, 2014</td>
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<td>UTSA Change Leaders updated list (as of June 20th)</td>
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<td><strong>5. Questions and Comments</strong></td>
<td>10 minutes</td>
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Steering Committee Meeting
June 24, 2013
Monday, 3:30p.m. – 5:00p.m.

<table>
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<tr>
<th>Action Items</th>
<th>Assigned to</th>
<th>Due Date</th>
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<tr>
<td>1. Provide the Dr Welch an update on the IR Reporting Interface.</td>
<td>Carlos/Jacque</td>
<td>July</td>
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<td>2. Provide the Committee an Analysis from the Change Leaders, Focus Group meetings</td>
<td>Kari</td>
<td>July</td>
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<td>3. Provide Dr Saygin information on impacts to Research operations resulting from the implementation of PeopleSoft</td>
<td>FMS Team</td>
<td>July</td>
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Meeting Discussion

New UTShare Project Management-Jacque

- New member introductions: Rebekah Smith (VP-Academic Affairs) Rebecca Anderson (VP-External Relations ), Dr. Can. Saygin (VP-Academic Affairs) and Kari Peterson (Change Management)
- The UTShare Executive Committee met and formalized the plans for our March 1, 2014 Go-Live date, with two post go-live, sequenced deployments.
- Discussed the revised Deployment Plan document by UTShare Executive Committee.
  - At Go-live, we’ll have full functionality for transactional data with limited approval process.
  - The deployed sequenced delivery approach allows campuses to stabilize the transition and use of PeopleSoft after the initial go-live before the full deployment of self-service features and workflow approval processing to all employees and managers.
  - Workarounds for securing approvals for various transactions will be developed at all campuses. We are in early stages of designing/verifying an approach for manual workflow approvals that can be used at UTSA using the Microsoft SharePoint application and Active Directory (emails). Carlos Gonzales is leading this effort and working to create forms that can be integrated with workflow. We will keep you posted on the progress.
  - Our campus is not using the PeopleSoft Recruiting module.
  - The Deployment Plan, Sequence 1 (July – August 2014) will introduce Manager Self-Service (MSS) with workflow approval for Purchasing, Travel & Expense, and Budget Transfers for all campus users and the Time & Labor/Absence Management Employee Self-Service (ESS) features delivered for entry of time reporting and absence events for only 1-2 departments, per Campus.
  - The Deployment plan, Sequence 2 will deliver the Time & Labor/Absence Management ESS features to the remaining campus departments.
  - While the sequenced deployment is not ideal and will cause additional burdens for a few months, it is a cautious delivery of Workflow approval to a large volume of end-users at campuses. This is intended to provide campuses more time to stabilize and ease the possible capacity support issues at ARDC related to workflow.

- UTShare Executive Committee re-prioritized their focus in the following areas:
  - Staff changes: Sharon Helms is the Interim Assistant Director of Share Services replacing Bill Daley due to his resignation, Marcos Velez is the new Technical Project Manager, Debra Brackens is now Manager of Client Services. In addition, ARDC will hire 11 new positions to expand their support capacity.
  - Increase in campus Project Management involvement with the UTShare Project Management Office (PMO). We can attest to this by the recent feedback from campus PM’s involvement with project activities.
  - Create a new project plan for March 1, 2014 go-live that includes milestones and task monitoring to minimize schedule slippage. In addition, Executive Committee has asked for a weekly status of the project plan to increase more visibility and accountability.
  - Increase in resolution of open tasks i.e. Security, Interfaces, etc by bringing in collective SWAT teams for face-to-face working sessions. For example, Javier and Julio are working with the ARDC team to resolve details with the TRS interface. They are in a lockdown and focus mode, and making great progress. One of the main goals is to work out as many issues for both FMS/HCM in order to restart Integration testing (due to start in August).
  - ARDC is committed to complete conversion, refresh and upgrades in order to minimize any bottlenecks...
before the Integration and testing phase starts.
  o Focus on core functionality for both HCM & FMS at Go-live.

Change Management Activities-Kari

- Our main focus has been about our “people”, by way of the Change Leaders. We’ve meet about 80% of the group and the results are as follows:
  o The Commitment Curve graphic displays we’ve moved from the awareness curve to desire phase. The Commitment Curve graphic displays each of the stages addressed by communications and the right appropriate methods used to manage our folks toward the change. We can see how Change Management moves at the speed of Project Management.
  o The integration of Project Management and Change Management will ensure our success.
  o At UTSA, our integration between Change Management & Project Management has proven we are in alignment. We are continuing efforts with Change Leaders focus groups, communications, demo and training. We will continue these efforts as we move through each phase.
  o As we meet with our focus groups, we carry the “managing through change” message, to help people understand how this impacts them, their departments, service levels and overall campus business processes and activities. We know information alone is not enough. This journey also requires, one-to-one dialog, engagement, coaching and most importantly active listening to build the trust and participation.
  o The primary goal has been working with the focus groups to gain a better understanding from the employee’s perspective. We’ve meet during May and July. Our object is to ensure we gather departmental expertise with transactions, reporting and the cascading change within the teams. In addition, we validate what we know and gain knowledge from what we don’t know. We will summarize the findings and recommendations and address actionable items, which will be present to Executive Committee, Steering Committee and Change Leaders next week.
  o By using the Cascading approach this builds Trust, Awareness and Visibility and will serves thru deployment.
  o Our near term actions consist of continued support with Change Leaders and seeks out additional support from Steering Committee members. In addition to coordinate timing of communications within UTSA. Finally, we will wrap up the focus group session and integrate within Change Management and Change Leaders to ensure project success.

Project Status Update

1. Technical Team Activities=Carlos
  o Security
    ❖ Our ticket volume has decreased to 20 open tickets, which has been an improvement due to this recent project plan change.
  o Interface-Reviewed the Campus Interface status via the handout spreadsheet
    ➢ The IR interface has not been started. It was noted that Brian had provided all the requirements so not sure what’s the delay. We will get another pulse on status and report back.
    ➢ The Digit measures interface is handled by OIT; however, we will maintain this on our end. We will adjust the target dates.
    ➢ Benga’s data reporting extracts is still on track. The team had a meeting last week and they are working closely with each system (Define, UT, etc.) and will compare the necessary addresses and configuration with our interface systems.

2. HCM Team Activities=Doug
  o For HR, the data quality during conversion was not as good which caused several issues before we could start integration testing.
  o For Time and Labor, the Time reporting test had some errors which were resolved. With the new change for Timekeepers we have to make some adjustments.
Conversion is still a big issue and we continue to resolve bottlenecks.

Payroll is full steam ahead and going well. For example, we have a team working on TRS reporting with target date to be ready when integration testing resumes in August, 2013.

Training also had to make some adjustments due to project changes. The following updates are:

- Offer front office training will kick off between Jan-Mar. 2014 and then, between June-Sept. 2014
- Classes completed by August/September to coincide with integration testing.
- Offer some online training as alternatives during the sequence phases. Our long term goals are to provide the majority of classes, online.
- We are rescheduling rooms. However, we will be limited to provide hands on training due to no training environment. We know this is a real concern for folks and we’ve expressed our concern to ARDC.

3. FMS Team Activities=Renee

- Our focus has been and will continue to be during the summer is conversation validation. For example, we have been working on GL conversion. We will convert year end as of Sept 1, and start converting monthly thereafter.
- Provided and overview of conversion activities for the new members.
- Some of the teams have already started work on conversation and testing, such as purchasing and expense.
- We’ve tested interfaces with Banner, GL and student refunds.
- We have seen a reduction in conversion errors.
- Security validation is going well.
- We will know the type(s) of data to be converted by mid-August. We’re aware this date is important to the financial department in order to plan AFR mid-year conversion tasks.

### Questions/Answers

1. I’ve experienced a messy PeopleSoft implementation which included workarounds. Please explain what is our plan for a manual workaround?

   - We will have to continue some of our current manual processes, such as approving timesheets via a paper process and incorporate these into a newly developed electronic process via forms. An example of a current business process was provided by Pam Bacon regarding the Purchasing procedures.

2. Is this new workaround decision a standard practice?

   - To be determined once additional deployment details are known.

3. It is a standard workaround when implementations are phased in?

   - We’ve seen this taken place within a year and span across multiple years to ensure system stability and end-user success with using the new system. Due to the complexity, volume and impact across all 7 institutions, this is not a viable option.

4. Have we considered running concurrent systems until we have full functionality?

   - No, this is not an option for DEFINE and PeopleSoft. It will be a complete switch over from DEFINE to PeopleSoft in March 2014.

5. How much have we spent on this project?

   - Without current data on-hand, we believe it is around 3 million.

6. Will service be impacted due to the sequenced deployment plan for workflow approvals?

   - Yes, we know service levels will decrease, especially for the back office staff. We hope to keep this at a minimum.

7. Are there plans to purchase additional ARDC hardware?

   - There have been some discussions but we’re not aware of a fine decision.

8. Will there be additional training for the new workaround procedures?

   - Yes.

9. Have we considered a workaround for the Research department regarding Notice of Award funding?

   - Yes. We currently do this today for special circumstances and can carry this forward. For example, we create shell accounts. We will work to ensure those accounts and procedures are setup.
10. Will PI be able to see their current budget accounts?
   ✓ Yes.

11. Is there any concern with other projects affecting the Banner system?
    ✓ No, this is not an issue.

12. Are we using the AFR validation?
    ✓ Yes, we are using the AFR for monthly reconciliation which has helped us in validation and adjustments.