### Attendees

- Jacquelyn Kyle
- Janet Parker
- Laura Murray
- Pamela Bacon
- Jackie Hobson
- Terry Wilson
- Carlos Gonzales
- Joshua Schafner
- Barbara Centeno
- Ken Pierce
- Marianne Woods
- Paul Allen Tyler
- Sandy Welch
- Rene Paniagua
- Marissa Peters

### Action Items

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Assigned to:</th>
<th>Due Date:</th>
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<tbody>
<tr>
<td>1. Determine if there will be a Principal Investigator (PI) Portal for the Grants/Contracts module.</td>
<td>Rene Paniagua</td>
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<tr>
<td>2. Identify local Change Management Leaders and send to Marissa Peters by this Friday, June 29th.</td>
<td>Steering Committee</td>
<td>6/29/2012</td>
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<td>3. Marissa Peters add the following to the Change Management Leaders list:</td>
<td>Marissa Peters</td>
<td>7/06/2012</td>
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<td>a. Add Job Role descriptions and expectations.</td>
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<td>b. Create deeper list of Business Affairs.</td>
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<td>c. Add Academic Affairs.</td>
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<td>4. Determine if UTSA’s UPK development requirements (Payroll, ePay, Time &amp; Labor, Absence Management, Grants, and Projects) are too much and should be shared among other campuses.</td>
<td>Jacquelyn Kyle; Rene Paniagua</td>
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<tr>
<td>5. Create list of how many years of historical data is needed per area.</td>
<td>Steering Committee</td>
<td>7/13/2012</td>
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<tr>
<td>a. Vet list against the to-be completed Conversion Plan to see if UTSA will need to provide our own historical data extracts to meet business needs.</td>
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<td>6. Request Master Schedule for ARDC of all UTShare processing events (i.e., Payroll, Benefits Enrollment, IPEDS reporting, Financial monthly close, etc.)</td>
<td>Jacquelyn Kyle</td>
<td>7/15/2012</td>
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### Meeting Discussion

**Overall UTShare Project Update**
- As of 6/08/2012, the overall status of the project is still “Behind.”
  - However, the status of FMS recently changed to “On Target.”
- Shane Hackney has been chosen as the new Campus Liaison and Training Lead.
  - Knowledgeable; he has already engaged the Training Committee and prepared a high-level training plan.

**PeopleSoft Deliverables Summary (Handout)**
- **HCM Modules**
  - All modules, except HR and Commitment Accounting, are 100% completed with documenting initial Business Process Guides (BPGs).
    - HR module expected to be 100% by beginning of July.
    - Commitment Accounting expected to be 100% by end of July.
- **FMS Modules**
  - All modules, except Grants and Asset Management, are 100% completed with documenting initial BPGs.
    - Grants are 94% complete.
    - Asset Management is 98% complete.
- **HCM & FMS Reports**
  - HCM → 100% state reports completed; 85% federal reports completed
  - FMS → 99% compliant federal/state/system reports

**Campus Conversion Validation**
- Conversion Validation is scheduled for July through September.
  - Two cycles of conversion validation are scheduled.
- There were 18 UTSA Team members identified as members of UTSA Conversion Validation Team.
The selected Conversion Validation Team will attend training on July 17th and 18th (subject to change).

**Post Go-Live Sustainment Plan**
- Project management is in the early stages of creating a Sustainment Plan (Help Desk, Tech support, etc.) to support PeopleSoft after Go-Live.

**FMS Activities Update**
- FMS Team is currently performing the following:
  - Completing BPGs and adding data flow diagrams to BPGs.
  - Updating Configuration Guides with more details.
  - Documenting Test Scenarios (some areas are farther along than others).
  - Validating Conversion Data.
    - Assets Management and General Ledger will contain the most detail to validate.

**HCM Activities Update**
- In general, HCM is behind FMS.
- HR finished identifying security roles and are now in the details.
- HR is still in recovery mode after recently having a change in their Consultant Lead.
- Commitment Accounting submitted the specifications required for their approved ~2,000 man-hour modification.
- Payroll is wrapping up their remaining BPGs (Payroll has the most BPGs at 53).

**Technical Update**
- Technical Team is focused on providing ARDC data layout samples to build campus interfaces.
  - Met June 8th deadline, and re-engineered some feeds to make them more efficient.
- Portal is in the middle stages of defining the functional pagelets that will exist for PeopleSoft end users.
  - Technical Team is going through “Contributor Training” to know how to update/change pagelets in the future.
- Shibboleth is being updated to have access to some of the SharePoint sites and should be completed this week.
- The UTSA PeopleSoft Training room was set up with 22 work stations to assist with training/testing.
  - Dr. Kelley was impressed with UTSA’s training room, as UTSA is the only school with a dedicated training room.

**Steering Committee Agenda Topics**
- There is an interface issue between FAIR and DEFINE/Banner where FAIR sometimes receives different information from DEFINE and Banner; FAIR will be replaced by Digital Measures, will it be possible for Digital Measures to receive HR data only from HR (not Banner) so there will not be an interface issue?
  - Yes. The interfaces from PeopleSoft to Digital Measures are already being conceptualized, and HR data will not come from Banner.
  - PeopleSoft will serve as the system of record for demographic data and Banner will provide Faculty teaching and class schedules.
- Is anyone testing PeopleSoft to see if it will crash if everyone logs on at the same time, everyone runs a report, etc.?
  - Yes. Load Testing is scheduled for November/December to test out all major crashing scenarios.
- Will Payroll processing be done on different days across campuses to distribute load on PeopleSoft system?
  - No discussion on this scenario. Could be considered in the future after analysis is done after Load Testing.
  - Also, a master schedule is needed at ARDC for all processing events.
- Will there be a PI Portal for the Grants/Contracts module?
  - Not sure. Portal is just now developing its framework, and the functional needs of each module have not been developed yet.

**Chart of Accounts (DEMO)**
- Janet Parker/Rene Paniagua presented PowerPoint on Chart of Accounts in PeopleSoft.
  - PowerPoint to be included with Meeting Minutes email.

**Change Management Overview**
- UTShare will be distributing 3 assessments from now until Go Live.
  - 1st Assessment – Phase III (current phase) → Functional Teams will receive assessment.
    - Assessment to be distributed week of July 2nd (subject to change).
  - 2nd Assessment – Phase IV → Broader Campus audience will receive same survey as Functional Teams.
  - 3rd Assessment – Phase V → Broader Campus audience will receive same survey a month before Go Live (to see if any changes occurred).
- The Executive Committee (EC) has 1st Assessment and is currently editing the document.
  - The EC is adamant about providing summary analytic feedback on the assessment in a timely manner to
- Local UTSA Change Management Leads (once identified by Steering Committee members) will eventually become a part of the Testing Team.
  - Training for these local Change Management Leads will begin as we go into Testing and have an overall training schedule from UTShare.
  - Leads will potentially travel; however, this will not be known until Testing time frames have been developed.

**Training**

- **General Updates**
  - Developing training is becoming a priority.
  - Current Training Approach was presented to the EC.
  - UTShare has **not** built a Training program; currently, campuses just know that UPK (User Productivity Kit) will be the main tool to develop training.
  - UTSA is responsible for developing UPKs for the following Modules:
    - This is a concern, as these are the major modules, which could place an undue burden on UTSA.

- **EC Training Questions (No Answers yet)**
  - When will the Back Office be trained?
    - Socialization/training/early presentations will need to occur **before** training.
  - How and when will we train the trainers?
    - EC wants Functional Committee members to be SMEs and teach classes, and Train the Trainers to help facilitate sessions.
  - How will we handle centralized vs. decentralized processing?
    - Currently, DEFINE is completely decentralized (Departments are doing the work); In PeopleSoft, there will be around 60-70% more data input, so it may be too much to ask Departments to do going forward.
  - How will we train Help Desk Support? Who are they going to be?
  - How are we going to do hands-on, detailed training?

- **High-Level Training Schedule – Major Milestones**
  - **Jan. 2nd** – Begin training (Faculty/Staff)
  - **Oct. 31st** – All UPK modules to be completely built.
    - Question: Will this be sufficient time to complete UPKs?
      - Probably not. However, we could potentially use Functional Committee’s verified Testing Scripts to build UPKs from to expedite the process.
  - **Sept. 1st** – Finalize training schedule for getting people trained for PeopleSoft.

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**Questions**

1. What does “updated BPGs” mean on the PeopleSoft Deliverables Summary handout?
   - It is a separate deliverable than BPGs for Phase III that is not yet fully defined, except that more detail is expected to be added to BPGs. Initial BPGs were high level and need to be updated with new information.
2. What does “BPG” mean?
   - Business Process Guides. BPGs are the “To Be” documentation on how we will do business in PeopleSoft.
3. Are there reports for Purchasing?
   - No. No specific Supply Chain reports were identified under any state/federal/system guidelines.
4. Will delivered Operating Finance reports be evaluated to see if they will meet institutional needs?
   - Yes. Reports will be removed from “specifications needed” if PeopleSoft delivered reports exist.
5. Are there any updates on Security, Access Authorization, etc.?
   - There is current discussion of which model to use going forward.
   - Lost an ARDC resource that went to Colorado. Trying to get another resource to identify staff on DEFINE that are considered REQUESTORS (creators in DEFINE) and Signees (approvers in DEFINE).
6. Why are we so focused on the security matrix now if the details won’t be known until other dependencies are completed?
   - This question was asked to the Security Team, and their response was that it is a PeopleSoft deliverable.
7. Have security roles been identified?
   a. Not completely. Security Team met with committees to identify the roles. Next step is to smooth out overlaps.
   b. **Note:** Need to be cognizant of new VPR structure when identifying these roles.

8. Is history in DEFINE going to be preserved in PeopleSoft?
   a. Yes; however, it has not yet been defined. UTShare will convert people that were Active 2 years prior to Go Live, but 5 years + history has not been determined.
   i. UTShare understands the importance of needing historical information.

9. Will all campuses use Chart Fields in the same way?
   a. Yes. Campuses are using Chart Fields the same way, but defining what goes in Chart Fields is per campus.

10. What is the nature of the 2,000+ man-hour Commitment Accounting modification?
    a. Modification allows Departments to request and create a new position → automatically routes to budget for funding directions → routes to HR to ensure employee job classification, justification, and compensation ranges are correct.
    i. Complexity of modification is due to budget portion.

11. Who enters the data in the Commitment Accounting modification?
    a. No one. The modification automatically inserts a job record into PeopleSoft after Budget and HR complete their portions of the Position request.