Steering Committee Meeting  
September 24, 2012  
Monday, 3:00p.m. – 5:00p.m.

<table>
<thead>
<tr>
<th>Action Items</th>
<th>Assigned to:</th>
<th>Due Date:</th>
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<tbody>
<tr>
<td>1. Receive feedback from academic areas on how to approach entering time for the Time &amp; Labor module.</td>
<td>Jacqueline Kyle; Doug Hartzler</td>
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<td>2. Select a room on main campus for Change Leader Orientation.</td>
<td>Henry Barrera</td>
<td>9/26/2012</td>
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<td>3. Ask Brian Cartee if Sandy Woodley (UT System Vice Chancellor) is being represented with respect to IR reporting needs.</td>
<td>Rene Paniagua</td>
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<td>4. Henry to work with Steering Committee to gather feedback on issues/concerns.</td>
<td>Henry Barrera; Steering Committee</td>
<td>10/31/2012</td>
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**Meeting Discussion**

**New Project Team Members**
  - 3 ½ years experience in HR.
- Doug Hartzler – new HCM Suite Lead (Jacque’s replacement).  
  - 12 years experience at the Health Science Center.
  - Has PeopleSoft implementation experience in HR and Finance and has been a part of two upgrades.
- Lost 3 people since June, but have gained 7 people since then.
- Currently, there is a total of 54 members on the PeopleSoft team.

**Project Update – Phase IV (Test & Train)**
- Configure and Develop (Phase III) activities are overlapping with Phase IV activities.
- Conversion Validation (ensuring data from DEFINE to PeopleSoft is correct) began last week (9/18/2012).
- Conversion of data will be in 2 cycles:
  - 1st cycle is from September 18 to October 12.
  - 2nd cycle will occur October 15 to November 16.
- An initial PeopleSoft core team was established to handle Conversion and Testing, but due to slippage, UTSA reached out to back-office personnel to help out with Conversion so that PeopleSoft members can focus on System Testing.
  - Conversion Validation and System Testing is happening concurrently.
- System Testing began 9/25/2012 and will be validating the many testing scripts created by Functional Committees.
  - System Testing will be in 2 cycles:
    - 1st cycle is from September 25 to October.
    - 2nd cycle will end in November.
  - System Testing Team will consist of 25 people for the next 2 months.

**Reporting**
- Reports
  - Reporting Team is currently developing UTShare-wide Operational Reports.
    - Individual Operational Reports will require Staff at campuses to develop these individual reports.
- Status
  - Purchasing Team feels like all delivered PeopleSoft reports will satisfy purchasing needs.
  - There were originally 840 Operational Reports, but that list has been condensed to around 400 now.
    - Some reports had different names but were the same reports, etc.
  - Number of reports and % complete is always changing as reports are still being vetted.
- Proposed Reporting Strategy
  - While OBIEE (Oracle Business Intelligence Enterprise Edition) is being built, UTShare will use a shadow reporting system that campuses can build and run queries on. Data will be refreshed in the reporting database on a daily basis, so queries will be up-to-date up until that work day.
    - UTShare will transition to EPM (Enterprise Performance Management) UTShare Data warehouse for Go-Live in order to keep up with the growing amount of data PeopleSoft will have.
- Key Reporting Tools
  - PeopleSoft Query is a delivered tool.
    - UTShare will identify users who will have required skillsets to run Queries and ensure they are properly trained.
Envision is another reporting tool, compatible with excel spreadsheets, that is available for Financial users.

**Special Reporting Committee**
- Lead by Brian Cartee, the Special Reporting Committee consists of 5 people whose goal is to refine UTShare Reporting, Training, & Presentation strategy. The team consists of:
  - Rene Paniagua, UTSA FMS Suite Lead
  - Brian Cartee, UTShare Project Director
  - Sharon Helms, UT Tyler Project Manager and Reporting Lead
  - Shane Hackney, Project Manager Office Liaison (consultant)
  - Corey White, FMS Suite Project Manager (consultant)

**UTSA PeopleSoft Support and Sustainment Center**
- The Support and Sustainment center is building a single point of contact to make the transition to PeopleSoft easier.
- When PeopleSoft is implemented, the amount of potential phone calls will increase from ~1,200 (current Admins) to all 6,400 current UTSA employees.
- **Ticketing System**
  - UTSA will be using an existing 3rd party ticketing system product that is already being used by 6 UTSA departments.
  - The goal is to have the ticket system functioning by System Testing so that the Support and Sustainment Center can begin functioning so that UTSA can begin becoming familiar with the process, create FAQs, etc.
  - The new ticketing system will replace “Ask HR.”
- The Sustainment Center phone number will be 210-458-SPOC (7762).

**Change Management**
- Orientation for the 78 Change Leaders occurs this Thursday (September 27th).
  - They will be bridge from Departments to Project and give feedback on Departments’ questions and concerns.
- Change Management will work with Change Leaders closely.
- **Change Management Activities:**
  - Had initial planning session with Marketing on how to communicate the PeopleSoft Project.
  - Working on message from President to campus regarding PeopleSoft Project.
  - Developing Newsletter, which will initially outline significant Business Process Changes that will need to be handled early.
  - Developing PeopleSoft Roadshow to present to back-offices.
    - Will pilot the roadshow with Change Leaders.

**Training**
- UTShare will primarily be using pre-delivered UPK (User Productivity Kit) as the training delivery method.
  - UPKs are generic and are not detailed to UTSA’s specific business process needs.
    - UTSA will be supplementing its UPK training with classroom content.
  - There were originally 5,000 topics for UPK training, but after multiple revisions there are now 443 topics to deliver training to the campus.
  - UTShare used the divide and conquer approach, and UTSA is responsible for developing 76 of the 443 topics.
    - Each campus will review each other’s topics after everyone finishes.
  - Some pre-delivered UPKs won’t work due to PeopleSoft modifications. The Training Team will create original UPKs to address training needs for PeopleSoft modifications.
  - Classrooms won’t be available for all types of training and personnel due to limited time.
    - There are 7 months left remaining before Go-Live.
    - There will be multiple iterations of training materials due to System Testing findings.
  - Training Team is currently looking for classrooms, but most training will be self-taught via online UPKs.
  - The Training Team presented a preliminary navigation training for back-office employees involved in Conversion Validation.
    - The training was successful; everyone was empowered use UPKs on their own.
Questions

1. How can you System Testing begin if configuration and developing activities are still going on?
   a. System Testing will be for what is ready now. However, there will be multiple iterations of testing to accommodate issues with configuration/development during testing.

2. Where are IR reports located?
   a. Each campus will receive their own data to run ad-hoc reports as they wish, so there are no pre-delivered reports.

3. What does OBIEE/EPM mean?
   a. OBIEE = Oracle Business Intelligence Enterprise Edition (more info)
   b. EPM = Enterprise Performance Management (more info)

4. Are Reporting dashboards incorporating both local and chancellor-related reports?
   a. Yes. Throughout the rest of this year the Reporting Team will be identifying all needed reports.

5. Will the UTSA IR group have access to PeopleSoft Query?
   a. Yes. But people who have access to PeopleSoft Query will need the required skillsets and training, as Querying has the ability to impact system performance if used incorrectly.

6. Will campuses be able to run reports before EPM is implemented?
   a. Yes. The reporting shadow system will have up-to-date information (just not that current day) to run reports from.

7. Will all employees have timesheets?
   a. Yes. But all Faculty/A&P/Non-exempts/etc. will use exception time reporting where they only fill in time for their absences.
      i. Weekly reports will be run to identify people who have not filled out timesheets.
   b. Non-exempt hourly employees will log their time throughout the week.

8. Where is PeopleSoft hardware/software/Hyperion located?
   a. At the ARDC (Arlington Regional Data Center).
   b. Only thing local will be the ticketing system for the PeopleSoft Support and Sustainment Center.

9. Will servers be able to handle the UTShare’s data load?
   a. Yes. Load Testing begins in December to ensure servers will be able to handle the load.

10. Do supervisors on the Change Leader list have to go to orientation?
    a. No.

11. Do we have kiosks and for facilities to enter time?
    a. No. Still have to work through logistics.

12. Can we move the Training Delivery date sooner than the planned January 22nd?
    a. Depends on status of Training development and System Testing at that time.

13. Will all employees be required to go to classroom training?
    a. Yes, but not all employees will need to attend all classroom training that is available.

14. Have other campuses discussed faculty issues?
    a. Not sure.

15. Can we find out how other academic institutions are handling faculty with respect to Time & Labor and Absence Management?
    a. No. Time & Labor and Absence Management are new modules and other institutions have not implemented them yet. Other institutions are waiting to see how the modules work for UTSA.