



UTSA PeopleSoft Change Management Plan

IMPLEMENTING UTSHARE AT UTSA

February 2013 v.1

Table of Contents

1.0 Overview.....	2
Goals and Objectives.....	2
Critical Success Factors.....	2
2.0 Scope and Strategy	3
2.1 Scope Table	3
2.3 Change Management Strategy by Target Audiences	4
2.4 Essential Duties and Cross Team coordination	5
2.5 Deliverables.....	7
3.0 Quality Management & Assurance.....	8
3.1 Method and Tools.....	8
3.2 Quality Management and Control.....	8
4.0 Assumptions and Risks.....	9
4.1 Assumptions.....	9
4.2 Risks and Mitigation/Contingency Reference.....	9

1.0 OVERVIEW

UTSA is implementing Oracle PeopleSoft version 9.1 under a UT System Shared Services project initiative with six other UT academic institutions. PeopleSoft will replace our DEFINE, HRMS, Point Plus and other business applications. This Change Management Plan will address our approach with transitioning the UTSA community from DEFINE/UT Direct to PeopleSoft while maintaining continuity of business operations. In the future, we envision the successful integration of the PeopleSoft system into UTSA's business processes and daily operations.

GOALS AND OBJECTIVES

Goal #1. Facilitate UTSA employees through the transition from DEFINE to PeopleSoft.

- A. Explain why DEFINE is no longer sustainable.
- B. Educate UTSA employees on available resources and training materials.
- C. Educate UTSA employees on the "Shared Service" model of PeopleSoft and how it impacts them.
- D. Educate UTSA employees on the post go-live PeopleSoft Support and Sustainment Center that will become their primary one-stop shop for help with the PeopleSoft System

Goal #2. Serve as the primary communication channel for UTSA employees regarding PeopleSoft.

- A. Communicate training logistics and its importance to UTSA employees.
- B. Communicate PeopleSoft benefits and functionality changes to UTSA employees.
- C. Maintain communication channels with updated information on PeopleSoft system functions and features.
- D. Educate UTSA employees on what is needed from them for a successful transition to PeopleSoft.

Goal #3. Support UTSA employees to actualize improved efficiencies on the research and business functions of the University using PeopleSoft applications.

- A. Communicate business process changes to UTSA employees and leadership and how it impacts them.
- B. Educate UTSA employees on potential gains in efficiencies within the research and business functions of the University from using PeopleSoft.
- C. Communicate the need to clean-up departmental and employee data prior to go-live.

CRITICAL SUCCESS FACTORS

- Executive Leadership commits to the change created by PeopleSoft and provides support to their respective areas.
- Change resistance from campus users is mitigated to allow a successful transition from DEFINE to PeopleSoft.
- PeopleSoft Project Team Leads provide timely feedback to Change Management so that proactive activities can occur.
- UTShare Project Management provides timely project status and directives for PeopleSoft implementation and Sustainment efforts.
- UTSA Change Leader feedback is used to improve change management resources and content.

2.0 SCOPE AND STRATEGY

2.1 SCOPE TABLE

The Scope Table is intended to address the work that must be performed to transition the campus to PeopleSoft at Go-Live (September 1, 2013).

In Scope	Out of Scope
1. Provide guidance and support to campus stakeholders and PeopleSoft end-users through the transition from DEFINE to PeopleSoft.	1. Develop PeopleSoft training materials.
2. Communicate benefits of PeopleSoft, business process changes, upcoming PeopleSoft trainings, Sustainment information and other Change Management messages to Campus Stakeholders and PeopleSoft end-users.	2. Conduct training sessions on PeopleSoft modules.
3. Maintain PeopleSoft website for campus end-users.	3. Provide in-depth answers to module-specific questions regarding PeopleSoft functionality.
4. Recruit and leverage appointed Change Leaders to assist campus's transition to PeopleSoft.	4. Answer error/issue questions found in PeopleSoft system.
5. Host meetings on topics concerning PeopleSoft and the transition from DEFINE.	
6. Escalate end-user questions to appropriate support area for resolution.	
7. Advocate PeopleSoft transition and long-term benefits of system move from DEFINE.	
8. Instill confidence in UTSA Leadership so that trickle-down PeopleSoft support can occur.	
9. Ensure training/transitional resources are developed to respond to PeopleSoft question/concerns as they arise.	
10. Develop and distribute PeopleSoft related communications for UTSA employees.	
11. Maintain FAQ and Glossary to answer common questions.	
12. Recognize contributions made by UTSA Project Team members.	
13. Disseminate UTShare announcements and information to UTSA PeopleSoft Project Team and Stakeholders.	
14. Escalate PeopleSoft module-specific questions and error/issues to PeopleSoft Support & Sustainment Center.	
15. Provide Change Management Topics and Business Process Impacts to Training Team for course catalog development.	

2.2 REQUIRED RESOURCES

- **Staffing:** 1 Change Management Lead,
1 Webmaster for PeopleSoft website updates,
2 Change Management Assistants (HCM and FMS)
- **Software:** Microsoft Office Suite, Photoshop, SnagIt
- **Services:** “GoTo Meeting” Webinar, Copy and Printing services
- **Facilities:** On-campus meeting rooms
- **Reference Documents:** Business Process Guides, Business Process Impacts

2.3 CHANGE MANAGEMENT STRATEGY BY TARGET AUDIENCES

Listed below is a summary of the planned Change Management approach for targeted audiences.

Audience	Strategy
Change Leaders (~50)	<ul style="list-style-type: none"> • Hold Change Leader meetings as needed to educate Change Leaders on business process changes, benefits, and other PeopleSoft information. • Be aware of business process changes and how it impacts their department. • Provide resources to aid departments in the transition from DEFINE to PeopleSoft. • Invite Change Leaders to participate in testing and piloting. • Communicate training logistics, PeopleSoft course catalog in order to involve their respective areas. • Develop communication vehicles for dissemination of information regarding PeopleSoft.
General employee population (UT Direct users)	<ul style="list-style-type: none"> • Ensure all employees can answer “What Is PeopleSoft” and list its benefits. • Provide easily accessible crosswalks from DEFINE to PeopleSoft. • Access ESS to: <ul style="list-style-type: none"> ○ View Paycheck (Pay Advice)/W-2 ○ Time Entry ○ Personal Info ○ Travel Reimbursement • Develop communication vehicles for dissemination of information regarding PeopleSoft.
Front Office (~1,000)	<ul style="list-style-type: none"> • Be aware of business process changes and how it impacts their department. • Communicate Chart of Accounts. • Communicate training logistics and the importance of training. • Communicate Sustainment Center model and how to access it. • Develop communication vehicles for dissemination of information regarding PeopleSoft.
Special Populations (Departments with special needs based on work schedules, job or organizational duties and responsibilities. - Police, Facilities, Library, others)	<ul style="list-style-type: none"> • Be aware of business process changes and how it impacts their department. • Educate employees on “workarounds” that will fit the special needs of their department. • Communicate training logistics and its importance. • Communicate Sustainment Center model and how to access it.

UTSA PeopleSoft Change Management Plan

	<ul style="list-style-type: none"> Develop communication vehicles for dissemination of information regarding PeopleSoft.
Approvers (~450) Use the DEFINE system to approve documents created by Campus DEFINE Users (creators). Includes Supervisors who will use MSS.	<ul style="list-style-type: none"> Be aware of business process changes and how it impacts their department. Communicate Sustainment Center model and how to access it. Educate employees on approving in PeopleSoft versus approving in DEFINE (i.e., there are no longer OV1s). Educate Supervisors on their responsibilities for employee time entry and delegation. Ensure Approvers understand the implications of “Error” messages in PeopleSoft and how it impacts their jobs. Develop communication vehicles for dissemination of information regarding PeopleSoft.
Back Office (~170)	<ul style="list-style-type: none"> Be aware of business process changes and how it impacts their department. Communicate Chart of Accounts. Communicate Sustainment Center model and how to access it. Develop communication vehicles for dissemination of information regarding PeopleSoft.
Training Leads and PeopleSoft Support and Sustainment Center Staff	<ul style="list-style-type: none"> Provide proactive questions/concerns gained from Change Leaders. Maintain communication on updated feedback from campus.

2.4 ESSENTIAL DUTIES AND CROSS TEAM COORDINATION

Change Management

- Facilitate UTSA’s transition from DEFINE to PeopleSoft.
- Market and promote benefits of PeopleSoft to the institution.
- Serve as a primary information conduit and liaison between PeopleSoft Project team, campus constituents and UTShare.
- Work closely with Campus Project Sponsors and Leadership to ensure strategic institutional goals, objectives, and needs are achieved.
- Prepare the institution for cultural changes resulting from new business processes and work practices.
- Create, distribute, and manage campus-wide communications and information about PeopleSoft and its impact on campus operations.
- Communicate with Training Leads and UTSA Project Team members on any relevant change Management topics impacting training.
- Manage PeopleSoft website content.
- Conduct presentations to UTSA Change Leaders, Faculty, and Employees.
- Create and distribute FAQs, glossaries, job aides, etc.
- Conduct road shows and events.
- Actively engage and participate on UTShare Change Management committee.
- Partner with and support other UTShare campus Change Management teams.
- Distribute UTShare communications to campus audiences and work teams as needed.

UTSA PeopleSoft Change Management Plan

UTSA Campus Change Leaders

- Partner with Change Leaders to receive departmental feedback, concerns and questions.
- Schedule focus group sessions to receive feedback regarding Change Management deliverables.
- Work with Change Leaders to develop and deliver communications regarding the transition to PeopleSoft.

UTSA Webmaster

- Partner with UTSA Webmaster to accomplish timely website updates.
- Ensure website updates meet common business standards.

UTSA Training Leads and Team Members

- Work with Training Leads and team members on website content and resources.
- Ensure training materials are aligned with top Business Process Impacts.
- Prepare front-office and end-user training (classes/publications) supporting FMS/HCM Business Processes and Self-Service.
- Partner with Training to receive issues/concerns identified during training.

UTSA Subject Matter Experts (SMEs)

- Partner with SMEs to develop content for glossaries and other resources.
- Communicate with SMEs to keep apprised of changes in modules and updates to business processes and issues that may arise with departments/back-offices.

UTSA Suite Project Leads

- Communicate with Suite Project Leads to keep apprised of changes in modules, updates to business process changes, project status, and issues/concerns that may arise with departments/back-offices.
- Attend regular status meetings with Training Leads and Suite Project Leads
- Deliver bi-monthly Project and Change Management reports & milestones.
- Work with Suite Project Leads to remove roadblocks.

UTSA Steering Committee

- Partner with Steering Committee members to receive departmental feedback, concerns and questions.
- Ensure respective departments are aware of available resources to aid in the transition to PeopleSoft.
- Work with Steering Committee members to ensure support of project implementation throughout the campus for a successful transition.

2.5 DELIVERABLES

- Change Management Plan
- Change Management Schedule
 - Activities per month
- Communication Vehicles
 - VPBA Newsletter
 - UTShare at UTSA PeopleSoft website
 - University monitors
 - UTSA Today notifications
 - PeopleSoft “Spotlight”
 - Implementation Project Team email distribution lists
 - Change Leaders
- University-wide Communications and Schedule
 - Cutover Activities
 - Training Schedule
 - Benefits of PeopleSoft
 - Shared Services Model
 - Project Status/Updates
- Change Leader meetings and team events.
- Business Process Changes impacting all of UTSA
 - Change Management Topics
- Business Process Changes by Department
- UTShare Impact Analysis
- UTShare Status Reports
- Change Management communication channels and vehicles
- Glossary, FAQs
- Points of Contact
- PeopleSoft website content
- Campus meetings, roadshows, and other events.
- Implementation Project Team communications
- PeopleSoft Implementation Project Team Events

3.0 QUALITY MANAGEMENT & ASSURANCE

3.1 METHOD AND TOOLS

- Change Readiness Assessments and Surveys
- Change Leader Feedback
- Project Management Feedback
- Steering/Operational Committee Feedback
- Pilot Change Management materials with Change Leaders
- Ranking the frequency of reviewed content on UTShare at UTSA website
 - Google Analytics
- UTSA Sustainment Ticketing Statistics

3.2 QUALITY MANAGEMENT AND CONTROL

The following describes the approval authority for Change Management deliverables.

- University-wide communications approved by Project Management and Executive Committee.
- Change Management Plan changes will be reviewed and approved by Change Management Leads and Suite Project Leads.
- Change Management resources (FAQs, Glossary, Crosswalks, etc.) are reviewed by Training Leads and approved by Project Management Leads.
- Change Leaders and UTSA employee feedback will be used to evaluate Change Management resources and communications.

4.0 ASSUMPTIONS AND RISKS

4.1 ASSUMPTIONS

- Functional Leads have adequate time to collaborate with Change Management to provide the information needed.
- Change Leaders actively participate, provide departmental feedback, and complete Change Management homework in a timely fashion.
- Executive Leadership supports the Project and actively mitigates resistance.
- University-wide communications (e.g., UTSA Today, "UTSA Everyone" email distribution) are available for Change Management use.
- Training will be required for Front-Office and Back-Office Staff prior to the granting of production security access, depending on job duties.
- PeopleSoft system works as intended.

4.2 RISKS AND MITIGATION/CONTINGENCY REFERENCE

Risk	Mitigation Strategy
Functional PeopleSoft Project Teams do not have enough time to provide feedback so that proactive Change Management activities can occur.	<ul style="list-style-type: none"> • Work closely with UTSA Suite Leads to gather necessary information so that proactive Change Management activities can occur. • Provide reactive Change Management activities to deal with end-user issues/concerns.
UTShare Project Management is unaware of escalated system issues and Change Management roadblocks at campus level.	<ul style="list-style-type: none"> • Work closely UTSA Suite Leads and UTSA PeopleSoft Project Manager to ensure issues and roadblocks are addressed with UTShare Project Management.
UTSA Leadership does not commit to the change created by PeopleSoft and provide support to their respective areas.	<ul style="list-style-type: none"> • Increase efforts with PeopleSoft Project Management and supportive VP Management to persuade non-supportive leadership. • Increase Change Management activities at the UTSA employee level for Departments where leadership does not support change.
UTSA Change Leader does not provide feedback to improve change management deliverables and content.	<ul style="list-style-type: none"> • Host a follow-up meeting on the importance of Change Leaders and their impact on the success of the PeopleSoft Project. • Inform UTSA PeopleSoft Steering Committee of non-feedback from Change Leaders. • Remove Change Leaders from duties if their activities are detrimental to the project after discussion with Project Sponsor.
Last-minute changes in system functionality and/or business processes.	<ul style="list-style-type: none"> • Communicate last-minute changes as they become known.
Change Leaders or other campus leaders relay inaccurate information to their staff	<ul style="list-style-type: none"> • Provide corrective communications to campus leader and department. • Ensure departments are aware of PeopleSoft points of contact and where to obtain up-to-date information.