EIS User Group
The Enterprise Information Systems (EIS) User group consists of key users from across the UNT System representing each of the module areas supported within EIS. This group meets with Enterprise Application Services technical leads and directors several times a year to share information of interest to the broader EIS population.

Each meeting includes a high level review of upcoming maintenance and upgrade events as well as an opportunity to ask questions about that schedule. The meeting also provides time to hear about the latest strategic initiatives, major projects and success stories related to EIS.

Thursday, February 23rd, 2017

Agenda:

- Governance process changes
- Campus Solutions Upgrade
- A Year in the Life of Enterprise Applications
- About Incidents and Service Requests
- PeopleSoft Training Options
- Success Stories and Wrap-up
IT Governance Process Changes
Agenda

• Review of ITGC and ITPP Membership
• Demand Assessment Detailed Flow
  • Swim lane
  • Creation of ARB
• Project Leveling Definitions
• Project Leveling Tool Review
• IT Prioritization Tool
• IT Resource Capacity Planning Tool
• Website Info
• Appendix
The new IT Governance Council is made up of the chair and co-chairs of the IT Planning & Prioritization Committees

The Advisory Committees have been consolidated.

CURRENT STRUCTURE
Prior to Jan 2017

TARGET STRUCTURE
Beginning Jan 2017

Hub and Spoke model supported by Educause. Currently in place at UoF, UoM, ND
IT Governance Council (ITGC) and IT Planning & Prioritization (ITPP) Membership

**Recommended Appointees - Dual role Leaders of campus ITPP**

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<thead>
<tr>
<th>Campus</th>
<th>UNT</th>
<th>UNTHSC</th>
<th>UNTD/COL</th>
<th>UNTS/ITSS</th>
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<td>ITPP Chair</td>
<td>Y</td>
<td>Y</td>
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<td>Co-chair</td>
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**Campus ITPP Membership/Areas of Interest**

**UNT Campus ITPP**
- Membership/Areas of Interest
  - Finance & Administration
  - Univ Information Systems
  - Academic IT
  - Administrative IT
  - Institutional Research and Effectiveness
  - Enrollment & Admissions
  - URCM Team
  - Learning Enhancement (CLEAR and Blackboard Learn)
  - ITSS CTO (replacing ITSS CIO)
  - ITSS BRM (replacing ITSS Dir SS)

**UNTD Campus ITPP**
- Membership/Areas of Interest
  - CFO Dallas
  - Enrollment & Admissions
  - Academic Affairs
  - College of Law
  - ITSS Support Manager
  - ITSS BRM

**HSC EIS ITPP**
- Membership/Areas of Interest
  - Enrollment Services
  - SPH Admissions
  - SHP Admission
  - GSBS Admissions
  - TCOM Admissions
  - Clinical Education
  - HSC IT CIO
  - ITSS BRM

**NEW System ITPP**
- Membership/Areas of Interest
  - Human Resources
  - System Controller
  - Financial Reporting
  - Student Finance
  - Budget
  - Administration/BSS
  - Treasury
  - ITSS CIO
  - ITSS BRM
Project Level Definitions

How do we distinguish between Service Requests and Level 1 projects? Following the ITIL definition, Service Requests are opened for items that are already operational. Level 1 Projects are opened for new features or something that is not operational.
**Project Request level selection criteria tool**

<table>
<thead>
<tr>
<th>Question</th>
<th>Description</th>
<th>Level 1</th>
<th>Level 2</th>
<th>Level 3</th>
<th>Level 4</th>
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</thead>
<tbody>
<tr>
<td>Scope of Change</td>
<td>What parts of the organization will this project impact?</td>
<td>A single function or department</td>
<td>Multiple functions or departments</td>
<td>Multiple locations and/or campuses</td>
<td>The entire organization</td>
</tr>
<tr>
<td>Expected Duration</td>
<td>What will be the expected length of the project. The longer the duration, the higher level of complexity and management required.</td>
<td>0-1 months</td>
<td>2-3 months</td>
<td>4-11 months</td>
<td>12+ Months</td>
</tr>
<tr>
<td>Experience</td>
<td>What prior experience does the project team possess with regards to this type of project?</td>
<td>Transparent to user.</td>
<td>This project has been done before by the organization.</td>
<td>This project has not been done before, but has a proven approach.</td>
<td>This is a new type of project for the organization and has not been proven.</td>
</tr>
<tr>
<td>Budget</td>
<td>What is the estimated capital investment for the project</td>
<td>$0-20,000</td>
<td>$20,000-50,000</td>
<td>$50,000-100,000</td>
<td>$100,000+</td>
</tr>
<tr>
<td>Customer Involvement</td>
<td>What is the level of customer involvement required for this project?</td>
<td>No customer involvement is required for project success.</td>
<td>Limited customer involvement is required for project success.</td>
<td>Moderate customer involvement is required for project success.</td>
<td>Extensive customer involvement is required for project success.</td>
</tr>
<tr>
<td>Integration</td>
<td>What degree of integration with other projects, systems, infrastructure, or organizations is required (i.e. integration with things external to the project)?</td>
<td>There are no integration requirements.</td>
<td>There are a moderate number of integration requirements into non essential systems.</td>
<td>There are a moderate number of integration requirements into essential systems.</td>
<td>There are significant integration requirements.</td>
</tr>
</tbody>
</table>

This tool supports the leveling definitions and can be applied to all demands during the intake process.
Delegation of Authority updated to align with project levels

<table>
<thead>
<tr>
<th>Level</th>
<th>Level description</th>
<th>Capital Investment Per project</th>
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<tbody>
<tr>
<td>Escalated by SSOC <strong>Shared Services Council</strong></td>
<td>• Escalated by SSOC</td>
<td>$1 Million +</td>
</tr>
</tbody>
</table>
| Level 4 **Shared Services Operations Committee** | • Very high risk and complexity  
• Projects that result in a transformation change to the way you do business.  
• Affects all lines of business or multiple technology areas, and have significant costs and/or risks | $100,001 - $999,999            |
| Level 3 **IT Governance Committee** | • High risk and complexity  
• Projects that affect multiple lines of business and have significant costs and/or risks                                                                                               | $20,000 - $100,000            |
| Level 2 **IT Governance Committee** | • Medium risk and complexity  
• Projects with broader exposure to the organization that present a moderate level of risk to business operations                                                                 |                                |
Each ITPP will create and maintain their own prioritizing. The results of all ITPPs list will be maintained by the BRMs in a Master list as input to the IT Governance Council.
Maximum work hours available based on institutional calendar

Available capacity for additional project work

Potential resource allocations based on the current pipeline of demands

Existing resource allocations for scheduled & in-flight projects

Forecasted “keep the lights on” activities such as maintenance, customer service, Level 1 projects, and administrative time

Resources not available due to absence, professional development, etc.

ITSS Resource Capacity – Total picture by month
Viewing the Project Portfolio holistically will allow us to increase capabilities

For a PPM strategy to be effective, it must acknowledge the day-to-day working realities of IT.

- New tools support alignment to a decision gate review process
  - Projects are reviewed at established decision points throughout the life of the initiative
  - Validation that right projects continue
  - Changes to schedule and/or budget are reviewed and documented

Tools and Standard Operating Procedures (SOP)s will help us operationalize and increase capabilities.
Updated Website’s Content

• Updated ITSS Governance Intranet site;
  • https://sharepoint.unt.edu/sites/ITSS_Strat/GOV

• Updated ITSS Governance External site;
  • https://itss.untsystem.edu/governance
Appendix
PMO Decision Gates

Decision Gates Level 3 & 4 Projects

- **Inputs:**
  - Business Case
  - Decision
- **Outputs:**
  - Project Charter Approval
  - Project Plan
- **Steps:**
  1. First Step
  2. Second Step
  3. Third Step
  4. Fourth Step

Decision Gates Level 1 & 2 Projects

- **Inputs:**
  - Project Request
- **Outputs:**
  - Approved Level 1 Project
  - Executive Identification
  - HWPL Assignment
- **Steps:**
  1. First Step
  2. Second Step
  3. Third Step
  4. Fourth Step

Product/Service Support Area

- **Inputs:**
  - Project Request
- **Outputs:**
  - Approved Level 1 Project
  - Executive Identification
  - HWPL Assignment
- **Steps:**
  1. First Step
  2. Second Step
  3. Third Step
  4. Fourth Step

Project Planning and Execution

- **Inputs:**
  - Project Scope Document
  - Level 1 Project Schedule Document
- **Outputs:**
  - Approved Scope Document
  - Level 1 Project Schedule
- **Steps:**
  1. First Step
  2. Second Step
  3. Third Step
  4. Fourth Step

Project Close

- **Inputs:**
  - Test Results
  - Final Status Reports
  - Change Request Documents (if applicable)
  - Project Close Document
- **Outputs:**
  - Signed Project Close Document
  - Lessons Learned
  - Contract Close
  - Final Budget
  - Audit Project Documents
  - Terminal Document
- **Steps:**
  1. First Step
  2. Second Step
  3. Third Step
  4. Fourth Step
PeopleSoft Campus Solutions 9.2 Upgrade
Campus Solutions History

- Campus Solutions v8.0 installed 2003/2004, upgraded to CS9.0 in November, 2009
- December 2015 - Oracle released 9.2 version of Campus Solutions
- Upgrade required by December 2019
  - Current 9.0 version will be unsupported
  - No critical tax, legal, and regulatory updates
Campus Solutions History:
• 2003 – CS8.0 install
• 2003-2006 added bolt-ons/customizations
• 2007 – CS8.9 technical upgrade
• 2007-2008 more bolt-ons/customizations
• 2009 – CS9.0 technical upgrade
• 2009-2017 more bolt-ons/customizations
## Campus Solutions Modules

<table>
<thead>
<tr>
<th>Campus Solutions Modules</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Records</td>
<td>Processing of student academic information including matriculation, class enrollment, grading and academic standing, transcripts, and graduation processing</td>
</tr>
<tr>
<td>Admissions</td>
<td>Applicant admissions and test score processing</td>
</tr>
<tr>
<td>Student Finance</td>
<td>Student tuition and fees billing including housing, payments, refunding, and creation of general ledger transactions</td>
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<tr>
<td>Financial Aid</td>
<td>Awarding and disbursement of student financial aid and scholarships</td>
</tr>
<tr>
<td>Academic Advising (Degree Audit)</td>
<td>Degree planning and auditing functions; advising notes</td>
</tr>
<tr>
<td>Campus Community</td>
<td>Student self-service for bio-demo data</td>
</tr>
</tbody>
</table>
Campus Solutions Touchpoints

- PeopleSoft Modules – 6
- Integrations
  - Other PS Applications – 3
  - 3rd Party Applications - 35
  - External Entities – 16
- Major Bolt-ons – 7
- Customizations – Approx. 60 processes
- Evaluation of new features
Campus Solutions Systems Overview

PeopleSoft Campus Solutions

- Admissions
- Student Records
- Academic Advising (Degree Audit)
- Student Center
- Campus Community
- Faculty Center
- Financial Aid
- Student Finance
- Bolt-ons

Other PeopleSoft Interfaces
- Finance
- Human Resources
- Portal

Other Interfaces (examples)
- NCAA
- External Applications
- State Reporting
- Federal Reporting

3rd Party Interfaces (examples)
- Blackbaud Raisers Edge
- u.Achieve Suite
- Blackboard Connect
- Facilities
- AdAstra
- HSC Health Clinics
- Admissions Lab
- RMS Housing
- Card Swipe
- Salesforce
- Faculty Profile
- Imaging
- ePortfolio
- Libraries
- On-line Transcripts
Campus Solutions future state:

- 2018: Campus Solutions 9.2 with fluid user interface and more delivered functionality
- 2018-2019: Assess business practices and supporting bolt-ons/customizations for process improvement and use of delivered functionality
Accomplished so far:

- UNT System Leadership Meetings March and September 2016 - Project information, recommended timeline, and estimated cost
- Submitted in FY17 Budget Cycle as “informational item” – awareness of the funding needs for a potential project in FY18
- Steering Committee formed:
  - Shannon Goodman (UNT)
  - A.J. Randolph (HSC)
  - Stephanie Holley (UNT Dallas)
  - Aaron LeMay (UNT System)
- Campus Governance and IT Governance Advisory Groups - Approval of the timeline recommendation
- SSOC approval of recommendation in January 2017
Campus Solutions 9.2 Upgrade

- Inventory of critical customizations/bolt-ons and business process documentation to be completed by November, 2017

- Fit/Gap workshops in February 2018 leading to a roadmap and CS Functionality Program to deliver business process improvements and optimizations

- Technical Upgrade to CS9.2 with go-live Thanksgiving, 2018

- Execution of Campus Solutions Functionality Program to begin spring 2018 with an anticipated completion by Dec. 2019
# CS9.2 Upgrade Timeline

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<th>FY 2017</th>
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<th>FY 2019</th>
<th>FY 2020</th>
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<td>Fit/Gap Sessions and Roadmap Development</td>
<td>Fit/Gap and Roadmap to Program Development</td>
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<td>Oracle Extended Support Ends</td>
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<td>End of Support - Dec. 2019</td>
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Questions?
A Year in the Life of Enterprise Applications

Presented by Jason Myre, Manager of Enterprise Application Support– ITSS
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**In Progress/Completed**

**Planned**

**Proposed**
About Incidents and Service Requests
Incidents and Service Requests

➢ **What is an Incident?**
An incident is defined as any event that is 1.) unplanned 2.) causes an interruption in service or a deterioration in service quality. Basically, something is broken or isn’t working correctly. Incident tickets can be submitted by users or IT.

➢ **What is a Service Request?**
A service request is defined as a formal request submitted by a user for some type of service, software, or hardware. Service requests are generally small tasks, requiring minimal effort (no more than 40 hours), and can often be repeatable, like granting security access. They will never involve creating a new service or implementation of new technology.
### Incidents and Service Requests

#### Closed in January

<table>
<thead>
<tr>
<th>Sub-division</th>
<th>Service Requests</th>
<th>Incidents</th>
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<tbody>
<tr>
<td>SAST - Linda</td>
<td>15</td>
<td>32</td>
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<td>FAST - Kem</td>
<td>12</td>
<td>60</td>
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<tr>
<td>EISTS - Robert</td>
<td>7</td>
<td>42</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>34</strong></td>
<td><strong>134</strong></td>
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</table>

- SAST – Student Administration Systems
- FAST – Human Capital Management (HCM), Finance, and Constituent Relationship Management (CRM)
- EISTS – Portal, PeopleTools, EIS Security, Imaging Services, PeopleSoft and non-PeopleSoft Application Administration
## Service Requests – Jan. 2017

<table>
<thead>
<tr>
<th>Team</th>
<th>Count</th>
<th>Sub-div</th>
<th>Count</th>
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<tbody>
<tr>
<td>ITSS-EA Admissions Systems Count</td>
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<td><strong>Grand Total</strong></td>
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</table>
Service Requests – 13-months

FY16 - FY17 EA Service Request Data Trends

- SAST
- FAST
- EISTS
- Total

Jan Feb Mar Apr May Jun Jul Aug Sept Oct Nov Dec Jan-17

Dorothy Flores – February 23, 2017
## Incidents – January 2017

<table>
<thead>
<tr>
<th>Team</th>
<th>Count</th>
<th>Sub-div</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITSS-EA Admissions Systems Count</td>
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<td>32</td>
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<tr>
<td>ITSS-EA Const Rel Mgmt (CRM) Count</td>
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<td>FAST - Kem</td>
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<td>ITSS-EA Human Resources Count</td>
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<tr>
<td>ITSS-EA Imaging Services Count</td>
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<tr>
<td>ITSS-EA Mobile App Support Count</td>
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<tr>
<td>ITSS-EA Payroll-Time-Labor Count</td>
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<td>ITSS-EA PeopleSoft App Spt Count</td>
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<tr>
<td>ITSS-EA Student Finance Count</td>
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<tr>
<td>ITSS-EA Student Records Count</td>
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</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>134</strong></td>
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</tbody>
</table>
Incidents – 13-month

FY16-FY17 EA Incident Data Trends
PeopleSoft Training Options
PeopleSoft Training Vendors

These companies offer both off-site classes and/or on-line training options:

- We have used:
  - Maverick - [http://www.mavericksolutions.net/courses/peoplesoft/](http://www.mavericksolutions.net/courses/peoplesoft/)
  - TeachMe2Day - [http://teachme2day.com/course-offerings](http://teachme2day.com/course-offerings) (no on-line training)

- We have not used:
  - PeopleSoft Tutorial - [http://peoplesofttutorial.com/peoplesoft-training](http://peoplesofttutorial.com/peoplesoft-training)
  - Tam Training - [https://www.tamtraining.com/courses/peoplesoft/](https://www.tamtraining.com/courses/peoplesoft/)
  - Exit Certified - [https://www.exitcertified.com/training/oracle/peoplesoft](https://www.exitcertified.com/training/oracle/peoplesoft)

NOTE: Submit a Service Request at ITHelp@untsystem.edu, if you need assistance with assessing your needs and available options.
EIS Success Stories

Shared by Robert Jones, Director – ITSS
UNT Alternative Loan Entrance Counseling

For UNT and UNT Dallas Financial Aid Offices

- Yevgeny Armor and Lacey Thompson
- Completed in January of 2017

A custom Private Loan Counseling function was created in student self-service as part of the Accept/Decline Financial Aid Awards process.
Mobile Applications – Phase I

For UNT, UNTHSC and UNT Dallas Campuses

- Staff Involvement
  - 17 ITSS Staff
  - 20 Campus Staff
  - 13 ITSS Student Employees
- Live in December 2017
- Phase II in progress

Over 10,500 Downloads across the three campuses

4+ Start rating in iTunes and Google Play
Applied Latest Image (or software update) to the HCM System

- Staff Involvement
  - 10 ITSS staff
  - 12 HR and Payroll Staff

Did you Know HCM Actually Means Something?
Human Capital Management

This project brought us up to the current (as of then) level of patches and enhancements from Oracle for version 9.2 of PeopleSoft HR and Payroll.
1099 Forms are required to be out by January 31\textsuperscript{st} of each year

- Staff Involvement
  - 3 people ITSS Staff
  - 4 people Finance Area staff

This project was more complex this year as data had to be combined from before and after the PeopleSoft 9.2 upgrade, which went into production on 3/1/2016.
Form I-9 is used for verifying the identity and employment authorization of individuals hired for employment in the United States.

Staff Involvement
- 5 ITSS Staff including HR, Project Management and Management & Risk Services teams
- 4 HR staff

The result of this project is a much more secure and efficient way to process I-9 documents for new employees.
Academic Advising, Degree Planning and Audit

For the UNT Campus

- Staff Involvement
  - 2 ITSS Staff
  - Several COB, COE, COI advisors
  - 1 outside consultant

Provides a custom online planner for graduate students and advisors in Colleges of Business, Education and Information to assist in the planning for and meeting of degree requirements.
Questions/Comments

EA_Council@unt.edu