

## Meeting Minutes

<b>Meeting Title:</b>	BG@100 Executive Steering Committee (ESC) Meeting
<b>Date:</b>	May 9, 2005
<b>Time:</b>	11:00 AM ET
<b>Location:</b>	McFall Chart Room

### Invitees/Attendees (\* in attendance, # absent, + substitute, = by conference call)

Names			
*	Bruce Petryshak	*	Toby Singer
*	Linda Dobb	*	Bill Gerwin
*	Chris Dalton	*	Cindy Fuller
*	Ron Lancaster	*	Ginny Pinkelman
*	Bahram Hatefi		
*	Ben Santelman		

### Opening Statements

**Bruce** called the meeting to order at 11:05 am. **Bruce** stated Ron gave a project update at Firelands today. **Bruce** asked Bill to look into various options regarding Action Item A013 (security) and to get back with the ESC on other alternatives.

### Approval of Minutes

The minutes from the April 11 meeting were reviewed and approved. The minutes will be posted to the BG@100 website.

### PeopleSoft Project Status Update

**Ben** stated a lot of parallel testing has occurred during the last month. The monthly parallel test of payroll was completed and saw good performance on the hardware production tier. More stress tests this month will be conducted on the system.

**Ben** reported 95% of employees reconciled pay came out exact, the other 5% reconciled quickly.

**Bill** stated 80% of employees will have difference in pay between .1 to .20 cents and this is a result of tax calculations. Bill will have better numbers at the next meeting. Bill is concerned with net-pay and people seeing a .5 cent difference. Bill stated it is a difference in the way PeopleSoft and AHRS system calculates. The issue was found during the parallel test. Bill found differences in AHRS that will be corrected in PeopleSoft. **Linda** stated the PeopleSoft pay advice may look different than the last printed pay advice. **Bill** stated we need to communicate this to employees. **Chris** asked if there is a difference in tax withholding and **Bill** advised yes the gross pay is the same; it is the difference in taxes. **Bill** will bring more information to the next meeting. **Linda** asked if a message can be sent to employees and **Chris** stated yes and also mention this is federal and state taxes. **Bahram** asked to see why this is occurring and **Bill** will bring to the next ESC meeting. **Linda** stated the message needs to reassure employees the university is not asking for money back.

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**Ben** stated they will be moving forward with bi-weekly parallel testing. Data entry will be a part of this parallel test. **Bill** found one mistake, but it was how the information was entered in AHRS. **Bruce** asked when the interfaces will be finished and **Ben** stated this week.

**Ben** stated time was spent during the last couple weeks to create the interface plan. A separate environment of SIS will be used to run live tests of every interface between SIS and HCM.

Work is also being completed on training and training for ITS operations. Ben advised a couple training sessions will be held with ITS before go live.

**Ben** advised a legacy cut-over plan is being developed to assist with jobs that need to run within PeopleSoft. **Linda** reiterated planning for two different things, one is the exact order of jobs so interface is correct, and the other item is figuring out how many legacy areas have to keep running after PeopleSoft is up. **Ben** stated yes the goal is to make AHRS view only access. There will be some reports, but no data entry. The batch jobs will go away. **Linda** asked if the job that accumulates all tax information for generating employees W2 information is converted. **Ben** stated it is all in PeopleSoft. All conversion tests have involved balance reconciliations. **Bill** stated the idea is not to use it in AHRS after go live. Bill stated everything processed in HR and Payroll should be done in PeopleSoft. **Bruce** stated HR and Finance will be running their own jobs which was not done before. **Bill** stated this will be addressed in training.

**Linda** asked about employees who have accounts that they put money into for healthcare; when they leave in the middle of the year how will it be figured. **Ben** stated it would not have to cross the two systems. **Bill** stated most everything processed in a normal basis will be addressed in training. **Linda** asked how many employees do not have direct deposit. **Ben** believes the monthly count is 100.

**Ben** stated a freeze is in process on the conversion programming and will not be touching those programs.

**Ben** advised published HR benefits training agenda for weeks of May 16<sup>th</sup> and 23<sup>rd</sup>, the core back office staff needs to be there all day. Work is being done to finish training materials. Ben reported items 813 and 829 (user security and documentation training) are behind schedule. The UPK side, view my paycheck is on the web. Compensation history is about ready to go as well and working on eHire. Ben stated also working on security roles.

**Bruce** changed the agenda to next address action items.

### **Action and Information Items**

**Bill** presented Action Item HCM-A014, Mask the Employee's Bank Account Number on the Self-Service "View Paycheck". This action item deals with additional privacy on the self service paycheck and masking the bank account number. **Chris** asked for clarification of which numbers will be masked on the pay information. **Bill** advised that all but the last 4 digits will be masked on the bank account number. Alternative 2 will modify the PeopleSoft application so that the Self-Service "View Paycheck" web pages have all but the last 4 digits of the bank account number masked with X's. A roll call vote was taken for Action Item HCM-A014 Alternative #2:

Chris Dalton	Approved
Linda Dobb	Approved
Bruce Petryshak	Approved
Ron Lancaster	Approved
Bahram Hatefi	Approved

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**Bill** presented Action Item HCM-A015, BGSU Branding of PeopleSoft Pages. This action item deals with branding the PeopleSoft web pages as delivered and replace with the BGSU logo. **Bill** worked with Fred Connor from Marketing and Communications to come up with an acceptable logo. The page as delivered has a PeopleSoft logo with blue bar. **Bill** is recommending replacing the PeopleSoft logo with the BGSU logo on the upper left corner and remove the blue bar. The PeopleSoft logo will still be present on many of the pages; however, the BGSU logo will be the prominent logo on pages.

**Ron** asked if the same process will occur with finance and student and are these pages viewed only by back office staff. **Bill** is concerned that without the change the pages could be printed from back office and would not notate BGSU, the PeopleSoft logo would print. Changing the logo recognizes the website as BGSU and a BGSU printed document. **Ron** pointed out if a screen is printed today it is not noted as BGSU and **Bill** stated that is correct. **Bill** stated it would be nice to see the BGSU branding. **Ron** asked if this is a contract issue. **Ben** stated instructions are provided on how to change the logo; typically schools change the logo. **Bahram** asked if every time the branding is changed will it involve hours and **Bill** stated yes. **Chris** asked with Finance and SIS as well and **Bill** stated yes and with upgrades. A roll call vote was taken for Action Item HCM-A015 Alternative #2:

Chris Dalton	Approved
Linda Dobb	Approved
Bruce Petryshak	Approved
Ron Lancaster	Approved
Bahram Hatefi	Approved

**Bill** presented Information Item HCM-029, Hours on Salary Employees Check. **Bill** stated for salary employees there is an hour's field attached to the job that is assigned. For normal full time salary employee it is a 40 hour week. There are a number of people in departments where the job is coded for a 1 – 2 hour job. When they receive a printed paycheck it shows the hours for the month, if it is 1 hour job for month it will show a 4.2 hour job. The earnings is correct, but it will look like they have high hourly salary. **Chris** asked if can it be suppressed and **Bill** believes it would confuse people. **Bill** stated the same program prints checks for monthly and bi-weekly; the issue is the print job. **Linda** asked if NA can be added and **Bill** will check. **Chris** stated this will only affect the employees who receive a printed check. **Linda** stated a letter needs to be sent. **Bill** stated because it is a printed check it is important to send a letter and okay to move forward.

**Bill** presented Information Item HCM-030, Multiple jobs, single check and taxes. This has to do with going from a multiple check to single check environment. Issue is today students who work multiple jobs receive two paychecks. When we move to PeopleSoft, the employee will receive one check. As an example, if a student makes \$200 for dining services biweekly and \$200 for ITS bi-weekly (as an example) the student probably pays "0" federal dollars. When you combine to a single check the \$400 this student made will now pay \$18.00 to federal government. **Bill** stated this is the correct way. In AHRS you have the option to say what you want to pay to federal government. **Bill** stated this needs to be done according to tax laws. By combining they will have a true report of what they are making. **Linda** stated the employees need to be

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notified. **Linda** stated during Administrative Staff Council it was asked if a reminder can be sent the first couple of months regarding paycheck information online. **Bill** stated paychecks will have an insert announcing the change. **Cindy** will work on reminders for May, June and July. **Cindy** asked if this should be done for several months and **Linda** stated yes.

**Bahram** asked about employees who work in two areas; Classified and Administrative. **Bill** advised it would be two different paychecks because it is two different pay cycles.

**Bill** presented Information Item HCM-031, Self-Service Link for Supervisors to View Leave Balances in the Portal. This process was set up so a supervisor has access to employees leave balances. Suggesting this new set of web pages be made available through self-service. The advantage to doing it this way is no training for all supervisors. Supervisors will be able to access link in the back office, will be able to get into portal for direct reports and pull all of the people who work for them and review leave balances. **Bill** stated many supervisors have access already to this information. **Bill** spoke to **Becca** and believes this is a good thing for the university so supervisors are aware of employees leave balances prior to signing off timesheets. **Bill** would like to make this a self service link. **Bill** stated any employee will see the link, if they are not a supervisor it will not show them any information. **Linda** asked if there is a way to just show this information to supervisors and **Ben** stated no, it will just say they have no direct reports.

**Chris** asked if the link can be changed to Supervisor Information. **Bill** will identify the link on the web as; Supervisor Information.

### **Review of Security Documents**

**Bill** presented a draft of Ethical use of BGSU PeopleSoft System, a description of security process flow security form and flow document. **Bill** would like to finalize forms this week so they can be distributed during HR training next week. **Bill** asked **Bahram** to look at the forms and review from an auditing standpoint. **Bill** is also working on a list of individuals who have access to approve security.

**Bill** asked if the committee had any questions regarding the security forms. **Ron** questioned page 3 of the security process flow, step #4 indicates a PeopleSoft security administrator. **Ron** asked who is the security administrator. **Bill** indicated the plan is to name someone in the project office as the security administrator. **Ron** asked when this person makes a change; adding a role to a person is this logged. **Bill** stated it should be and can be. **Ben** stated when the role is added it time stamps the ID and who changed it. **Ron** asked is there something that says on May 7 these changes were made and **Ben** stated yes this can be tracked. **Bill** stated can log or audit any table within PeopleSoft. **Ron** stated once the system is live the number of changes should be small. **Bill** stated yes, but not through the process and validating the users. **Bruce** stated currently having discussions on the process and asked if **Bahram** and **Ron** would like to participate. **Bruce** asked **Bill** to invite **Bahram** and **Ron** to future meetings. **Ron** stated someone independent needs to know a paper trail exists for these roles. **Bill** stated will come up with all of the processes involved.

**Bahram** stated it is a good idea to see a history of all changes and number of changes. **Linda** stated when employees retire or change roles at the university HR should have check lists aside from keys for authorization, security etc. **Bill** is auditing some of the internal security, anything that is manual has to go off check lists and this is where items are missed. **Bill** asked if

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there were any questions regarding the documents as he needs to begin the process of filling out the form.

**Bahram** asked how many copies of the form will be kept. **Bill** believes one copy of the AHRS form is now kept in payroll. **Bill** would like to make this process all electronic. The issue is how to do electronic signature correctly so it is legal. **Bill** stated we will have to use paper copies at first, and he is open to how many copies should be kept. **Bahram** stated a few copies and archive. **Bill** stated that later we can use the document imaging system. **Bruce** asked that **Barham** and **Ron** be added to future meetings.

**Bruce** stated there are 3 items left for discussion and asked the committee to discuss now or the next meeting.

**Ron** asked about the May letter to employees and who will receive the letter. Will adjunct faculty who taught only in the spring receive the memo? **Cindy** stated anyone who is a university employee will receive the letter. **Ron** stated adjunct faculty are not university employees. **Bill** is asking HR to provide the mailing labels and believes they are cutting them from the HR system. **Bill** will follow up with HR regarding the labels. **Ron** is concerned the 9 month faculty will not be included nor faculty who teach fall. **Linda** stated the letter is only good for people who have access to MyBGSU and faculty who teach fall only may not yet have access. **Ron** stated they teach every fall. **Cindy** stated the letter is on the web along with general communication to look for the letter. **Bill** will check with HR on mailing labels. **Bruce** asked **Bill** to send an answer out to the committee.

### **Hours and Costs Report**

In the interest of time the hours and costs report will be covered at the next meeting.

### **Portal Update**

In the interest of time the portal update will be covered at the next meeting.

### **Communications Review**

In the interest of time the communications review will be covered at the next meeting.

**Bruce** adjourned the meeting at 12:15 pm.

<b>Next Meeting Date:</b>	May 23, 11:00-12:00 AM ET
<b>Next Meeting Location:</b>	McFall Chart Room
<b>Minutes Prepared by:</b>	Ginny Pinkelman