2005-2006 :: Business Admin Systems

1. Mission Statement:
The mission of Information Resources Business Systems is to provide quality application system development, maintenance, support and technical assistance within the Division of Business Affairs for Human Resource Management, Finance, and Budget application systems, sustaining the UTD mission in advancing excellent education and research programs for students, faculty and staff.

2. Objectives:

2.1 Protect employee data:
Protect employee data by implementing SunGard HE Plus enhancement for HR that incorporates use of a campus wide ID (cwid) for an employee that replaces the Social Security Number as the employee ID.

2.1.1 Related Strategic Plan Item(s): III-1 Dynamic Change Management

2.1.2 Related Institutional Priority Item(s): COM-2 Protect Enrollment Gains, Access and Student Quality as part of moving toward Tier One Status

2.2 Secure tech trng-SunGard HE Banner products & UNIX:
Attend technical training classes to acquire needed skill sets in UNIX, Oracle and SunGard HE Banner products in order to provide quality analysis, design, programming, conversion and technical support for ERP implementation and other initiatives for Division of Business Affairs; HR, Payroll, Finance and Budget.

2.2.1 Related Strategic Plan Item(s): III-1 Dynamic Change Management

2.2.2 Related Institutional Priority Item(s): SP-8 Reduce Costs; COM-3 Sustain Progress toward Tier One Status in terms of programs, research and faculty quality

2.3 Secure user trng for SunGardHE Banner HR & Finance:
Insure that Business Systems IR staff gain functional department knowledge and training of Banner modules for departments that they support so as to understand how Banner works and performs for end-users.

2.3.1 Related Strategic Plan Item(s): III-1 Dynamic Change Management

2.3.2 Related Institutional Priority Item(s): SP-8 Reduce Costs; COM-3 Sustain Progress toward Tier One Status in terms of programs, research and faculty quality

2.4 Improve reporting of individual Vac/Sick Leave emp:
Produce a monthly email to employees documenting the employee's year-to-date vacation and sick leave: Starting Balance, Accrued, Used and Ending Balance

2.4.1 Related Strategic Plan Item(s): III-1 Dynamic Change Management

2.4.2 Related Institutional Priority Item(s): COM-3 Sustain Progress toward Tier One Status in terms of programs, research and faculty quality

2.5 Implement upgrade-vendor electronic print software:
Keep current with SunGard HE electronic print (ePrint) software by implementing version 3.0 upgrade

2.5.1 Related Strategic Plan Item(s): III-1 Dynamic Change Management

2.5.2 Related Institutional Priority Item(s): COM-3 Sustain Progress toward Tier One Status in terms of programs, research and faculty quality

3. Measures & Findings:

3.1 Review TX Admin Code for compliance by HR:
Review Texas Administrative Code Section 202 for compliance by the Human Resource Management System.

3.1.1 Success Criteria: report/finding produce

3.1.2 Related Objective(s): Protect employee data

3.1.3 Results Related To Success Criteria:
SunGard HE Plus cwid enhancement for HR puts Human Resource Management System in compliance with Texas Administrative Code Section 202

3.1.4 Achievement Level: Met

3.1.5 Further Action: Yes

3.2 Information Security audit for HRS, ePrint & CICS:
UTD Information Security audit for HRS, ePrint and CICS.

3.2.1 Success Criteria: Only authorized individuals can access employee data.

3.2.2 Related Objective(s): Protect employee data

3.2.3 Results Related To Success Criteria: Audit reveals only authorized individuals has access to employee data

3.2.4 Achievement Level: Met

3.2.5 Further Action: Yes

3.3 Review reprtd problems for access & security issue: Review of reported problems for access and security issues.

3.3.1 Success Criteria: All reported problems are resolved or are scheduled to be addressed.

3.3.2 Related Objective(s): Protect employee data

3.3.3 Results Related To Success Criteria: Any reported problems were addressed and resolved

3.3.4 Achievement Level: Met

3.3.5 Further Action: Yes

3.4 Meet with HRM to determine if problem in HRS exist: Meet with HRM management to determine if problems in HRS exist that have not been reported.

3.4.1 Success Criteria: No problems exist in HRS that has not already been reported.

3.4.2 Related Objective(s): Protect employee data

3.4.3 Results Related To Success Criteria: No problems identified that have not already been reported

3.4.4 Achievement Level: Met

3.4.5 Further Action: Yes

3.5 Introduction to Oracle - Training report: Introduction to Oracle - Training report

3.5.1 Success Criteria: Completion of training

3.5.2 Related Objective(s): Secure tech trng-SunGard HE Banner products & UNIX

3.5.3 Results Related To Success Criteria:
Business Systems IR staff completed scheduled technical training through January 2006

3.5.4 Achievement Level: Met

3.5.5 Further Action: Yes

3.6 Fundamentals of UNIX -Training report: Fundamentals of UNIX -Training report

3.6.1 Success Criteria: Completion of training

3.6.2 Related Objective(s): Secure tech trng-SunGard HE Banner products & UNIX

3.6.3 Results Related To Success Criteria:
Business Systems IR staff completed scheduled technical training through January 2006

3.6.4 Achievement Level: Met

3.6.5 Further Action: Yes

3.7 Adv PL/SQL & Database Objects - Training report: Advanced PL/SQL and Database Objects - Training report

3.7.1 Success Criteria: Completion of training

3.7.2 Related Objective(s): Secure tech trng-SunGard HE Banner products & UNIX

3.7.3 Results Related To Success Criteria:
Business Systems IR staff completed scheduled technical training through January 2006

3.7.4 Achievement Level: Met

3.7.5 Further Action: Yes

3.8 Oracle DBA I - Training report: Oracle DBA I - Training report

3.8.1 Success Criteria: Completion of training

3.8.2 Related Objective(s): Secure tech trng-SunGard HE Banner products & UNIX

3.8.3 Results Related To Success Criteria:
Business Systems IR staff completed scheduled technical training through January 2006

3.8.4 Achievement Level: Met

3.8.5 Further Action: Yes

3.9 Tech Training - Banner 7 General and Security : Tech Training - Banner 7 General and Security -Training report

    3.9.1 Success Criteria: Completion of training

    3.9.2 Related Objective(s): Secure tech trng-SunGard HE Banner products & UNIX

    3.9.3 Results Related To Success Criteria:
    Business Systems IR staff completed scheduled technical training through January 2006

    3.9.4 Achievement Level: Met

    3.9.5 Further Action: Yes

3.10 Advanced Oracle DBA - Training report: Advanced Oracle DBA - Training report

    3.10.1 Success Criteria: Completion of training

    3.10.2 Related Objective(s): Secure tech trng-SunGard HE Banner products & UNIX

    3.10.3 Results Related To Success Criteria:
    Business Systems IR staff completed scheduled technical training through January 2006

    3.10.4 Achievement Level: Met

    3.10.5 Further Action: Yes

3.11 Intro to C and Pro*C Programming - Training: Introduction to C and Pro*C Programming - Training report

    3.11.1 Success Criteria: Completion of training

    3.11.2 Related Objective(s): Secure tech trng-SunGard HE Banner products & UNIX

    3.11.3 Results Related To Success Criteria:
    Business Systems IR staff completed scheduled technical training through January 2006

    3.11.4 Achievement Level: Met

    3.11.5 Further Action: Yes

3.12 Oracle Application Servers - Training report: Oracle Application Servers - Training report

    3.12.1 Success Criteria: Completion of training

    3.12.2 Related Objective(s): Secure tech trng-SunGard HE Banner products & UNIX

    3.12.3 Results Related To Success Criteria:
    Business Systems IR staff completed scheduled technical training through January 2006

    3.12.4 Achievement Level: Met

    3.12.5 Further Action: Yes

3.13 Web Tailor Technical -Training report: Web Tailor Technical -Training report

    3.13.1 Success Criteria: Completion of training

    3.13.2 Related Objective(s): Secure tech trng-SunGard HE Banner products & UNIX

    3.13.3 Results Related To Success Criteria:
    Business Systems IR staff completed scheduled technical training through January 2006

    3.13.4 Achievement Level: Met

    3.13.5 Further Action: Yes

3.14 Oracle Forms 10G - Training report: Oracle Forms 10G - Training report

    3.14.1 Success Criteria: Completion of training

    3.14.2 Related Objective(s): Secure tech trng-SunGard HE Banner products & UNIX

    3.14.3 Results Related To Success Criteria:
    Business Systems IR staff completed scheduled technical training through January 2006

    3.14.4 Achievement Level: Met

    3.14.5 Further Action: Yes

3.15 Monitor staff utilization of new skill sets :
    Monitor staff utilization of new skill sets in support of ERP and other initiatives

    3.15.1 Success Criteria: All Staff able to perform duties using new skill sets in support of ERP and other initiatives

3.15.2 Related Objective(s): Secure tech trng-SunGard HE Banner products & UNIX

3.15.3 Results Related To Success Criteria: Staff demonstrated knowledge of new skill sets by completing ERP assigned tasks, working on project teams to utilize new skill sets in designing process improvement systems

3.15.4 Achievement Level: Met

3.15.5 Further Action: Yes

3.16 Finance COA; Reporting, Conversion Strategy Trng: Finance COA; Reporting, Conversion Strategy Training report

3.16.1 Success Criteria: Completion of training

3.16.2 Related Objective(s): Secure user trng for SunGardHE Banner HR & Finance

3.16.3 Results Related To Success Criteria: All Business Systems IR Finance support staff completed training

3.16.4 Achievement Level: Met

3.16.5 Further Action: Yes

3.17 HR System Overview Training report: HR System Overview Training report

3.17.1 Success Criteria: Completion of training

3.17.2 Related Objective(s): Secure user trng for SunGardHE Banner HR & Finance

3.17.3 Results Related To Success Criteria: All Business Systems IR HR support staff completed training

3.17.4 Achievement Level: Met

3.17.5 Further Action: Yes

3.18 HR empl position control, budget Training : HR employee position control, budgeting Training report

3.18.1 Success Criteria: Completion of training

3.18.2 Related Objective(s): Secure user trng for SunGardHE Banner HR & Finance

3.18.3 Results Related To Success Criteria: All Business Systems IR HR support staff completed training

3.18.4 Achievement Level: Met

3.18.5 Further Action: Yes

3.19 Finance AP and Bank Reconciliation Training report: Finance AP and Bank Reconciliation Training report

3.19.1 Success Criteria: Completion of training

3.19.2 Related Objective(s): Secure user trng for SunGardHE Banner HR & Finance

3.19.3 Results Related To Success Criteria: All Business Systems IR Finance support staff completed training

3.19.4 Achievement Level: Met

3.19.5 Further Action: Yes

3.20 HR system benefits, Deductions-COBRA Training : HR system benefits, Deductions-COBRA Training report

3.20.1 Success Criteria: Completion of training

3.20.2 Related Objective(s): Secure user trng for SunGardHE Banner HR & Finance

3.20.3 Results Related To Success Criteria: All Business Systems IR HR support staff completed training

3.20.4 Achievement Level: Met

3.20.5 Further Action: Yes

3.21 Finance Rules, Security and Approvals - Training : Finance Rules, Security and Approvals - Training report

3.21.1 Success Criteria: Completion of training

3.21.2 Related Objective(s): Secure user trng for SunGardHE Banner HR & Finance

3.21.3 Results Related To Success Criteria: All Business Systems IR Finance support staff completed training

3.21.4 Achievement Level: Met

3.21.5 Further Action: Yes

3.22 Finance Self Service- Training report: Finance Self Service- Training report

3.22.1 Success Criteria: Completion of training

3.22.2 Related Objective(s): Secure user trng for SunGardHE Banner HR & Finance

3.22.3 Results Related To Success Criteria: All Business Systems IR Finance support staff completed training

3.22.4 Achievement Level: Met

3.22.5 Further Action: Yes

3.23 Monitor staff perf in support of functional depts: Monitor staff performance in support of functional departments during ERP

3.23.1 Success Criteria: Staff able to assist functional departments in ERP implementation

3.23.2 Related Objective(s): Secure user trng for SunGardHE Banner HR & Finance

3.23.3 Results Related To Success Criteria: Staff demonstrated knowledge of functional department processes

3.23.4 Achievement Level: Met

3.23.5 Further Action: Yes

3.24 Report to Define requirements: Report to Define requirements

3.24.1 Success Criteria: Requirements defined

3.24.2 Related Objective(s): Improve reporting of individual Vac/Sick Leave emp

3.24.3 Results Related To Success Criteria: All requirements identified and verified with HRM

3.24.4 Achievement Level: Met

3.24.5 Further Action: Yes

3.25 Report in Design and develop process: Report in Design and develop process

3.25.1 Success Criteria: Unit testing complete

3.25.2 Related Objective(s): Improve reporting of individual Vac/Sick Leave emp

3.25.3 Results Related To Success Criteria: Unit testing defects documented and corrected

3.25.4 Achievement Level: Met

3.25.5 Further Action: Yes

3.26 Report on conducting system / user acceptance test: Report on conducting system / user acceptance testing

3.26.1 Success Criteria: All Issues resolved and HRM signs off

3.26.2 Related Objective(s): Improve reporting of individual Vac/Sick Leave emp

3.26.3 Results Related To Success Criteria: Positive feedback received by HR department from employees

3.26.4 Achievement Level: Met

3.26.5 Further Action: Yes

3.27 Report on Automated reptng of ind Vac Sick Leave: Report on Automated reporting of individual Vacation/Sick Leave for employees

3.27.1 Success Criteria: All Employees receive vacation/sick leave report via email monthly

3.27.2 Related Objective(s): Improve reporting of individual Vac/Sick Leave emp

3.27.3 Results Related To Success Criteria: Monthly emails are automatically generated and sent to all employees with Vacation/Sick Leave taken for that month and balances

3.27.4 Achievement Level: Met

3.27.5 Further Action: Yes

3.28 ePrint software upgrade installation report: ePrint software upgrade installation report

3.28.1 Success Criteria: ePrint operational in test

3.28.2 Related Objective(s): Implement upgrade-vendor electronic print software

3.28.3 Results Related To Success Criteria: Install into to test was successful

3.28.4 Achievement Level: Met

3.28.5 Further Action: Yes

3.29 Test software upgrade: Test software upgrade

  3.29.1 Success Criteria: No functionality lost and new features work

  3.29.2 Related Objective(s): Implement upgrade-vendor electronic print software

  3.29.3 Results Related To Success Criteria: IR and user testing indicated no functionality lost and new features work

  3.29.4 Achievement Level: Met

  3.29.5 Further Action: Yes

3.30 ePrint software upgrade installation report: ePrint software upgrade installation report

  3.30.1 Success Criteria: Successful install in production and no end-user interruption

  3.30.2 Related Objective(s): Implement upgrade-vendor electronic print software

  3.30.3 Results Related To Success Criteria:
  ePrint software upgrade to version 3.0 implemented into production on schedule

  3.30.4 Achievement Level: Met

  3.30.5 Further Action: Yes

5. Closing the Loop:

5.1 cwid enhancement for HR placed into production: SunGard HE Plus cwid enhancement for HR placed into production

  5.1.1 Related Objective(s): Protect employee data

  5.1.2 Related Measure(s): Review TX Admin Code for compliance by HR

  5.1.3 Responsible Person: HRM Department

  5.1.4 Target Date: Summer 2006

  5.1.5 Priority: High Priority

5.2 Quarterly scheduled audits on-going:
  Quarterly scheduled audits on-going between IR Business Systems and HRM, Finance and Budgets departments

  5.2.1 Related Objective(s): Protect employee data

  5.2.2 Related Measure(s): Information Security audit for HRS, ePrint & CICS

  5.2.3 Responsible Person: Business Systems Manager

  5.2.4 Target Date: March 2007

  5.2.5 Priority: Medium Priority

5.3 On-going meetings:
  On-going meetings where problems are identified, prioritized and put on schedule for resolution during HRM and Business Systems bi-weekly meetings and Between Business Systems and Finance monthly meetings.

  5.3.1 Related Objective(s): Protect employee data

  5.3.2 Related Measure(s):
  Review reprtd problems for access & security issue; Meet with HRM to determine if problem in HRS exist

  5.3.3 Responsible Person: Business Systems Manager

  5.3.4 Target Date: Regularly scheduled meetings

  5.3.5 Priority: Medium Priority

5.4 Training and skill sets being used:
  Training and skill sets being used to develop new applications and for future ERP project. Several process improvements projects have been identified and initiated for HRM and Finance that will use technical skill sets achieved during Project Quest.

  5.4.1 Related Objective(s): Secure tech trng-SunGard HE Banner products & UNIX

  5.4.2 Related Measure(s):
  Introduction to Oracle - Training report; Fundamentals of UNIX -Training report; Adv PL/SQL & Database Objects - Training report; Oracle DBA I - Training report; Tech Training - Banner 7 General and Security ; Advanced Oracle DBA - Training report; Intro to C and Pro*C Programming - Training; Oracle Application

Servers - Training report; Web Tailor Technical -Training report; Oracle Forms 10G - Training report

5.4.3 Responsible Person: Business Systems Team

5.4.4 Target Date: End of 2007

5.4.5 Priority: Medium Priority

5.5 Continue monitor staff for skill set utilization: Continually monitoring staff for skill set utilization and for any refresher training that might be required

5.5.1 Related Objective(s): Secure tech trng-SunGard HE Banner products & UNIX

5.5.2 Related Measure(s): Monitor staff utilization of new skill sets

5.5.3 Responsible Person: Business Systems Manager

5.5.4 Target Date: FY 2007

5.5.5 Priority: Medium Priority

5.6 Bus Sys IR staff gained valuable appl knowledge: Business Systems IR staff gained valuable application systems functional knowledge that will benefit future ERP, legacy system enhancements and process improvement endeavors – automation of monthly account reconciliation process. IT personnel that support application systems, not only need to understand the system technically, but also need to understand an application functionally.

5.6.1 Related Objective(s): Secure user trng for SunGardHE Banner HR & Finance

5.6.2 Related Measure(s):
Finance COA; Reporting, Conversion Strategy Trng; HR System Overview Training report; HR empl position control, budget Training ; Finance AP and Bank Reconciliation Training report; HR system benefits, Deductions-COBRA Training ; Finance Rules, Security and Approvals - Training ; Finance Self Service- Training report

5.6.3 Responsible Person: Business Systems Team

5.6.4 Target Date: FY 2007

5.6.5 Priority: Medium Priority

5.7 Continue monitor staff for functional knowledge: Continually monitoring staff for functional department knowledge in resolving issues and designing new systems

5.7.1 Related Objective(s): Secure user trng for SunGardHE Banner HR & Finance

5.7.2 Related Measure(s): Monitor staff perf in support of functional depts

5.7.3 Responsible Person: Business Systems Manager

5.7.4 Target Date: FY 2007

5.7.5 Priority: Medium Priority

5.8 Sign-off of requirements document by HRM: Requirements document is an agreement between HRM and IR Business Systems and needs to be signed before the project begins.

5.8.1 Related Objective(s): Improve reporting of individual Vac/Sick Leave emp

5.8.2 Related Measure(s): Report to Define requirements

5.8.3 Responsible Person: Business Systems Team & HRM

5.8.4 Target Date: FY 2007

5.8.5 Priority: Medium Priority

5.9 System testing and user acceptance testing: System delivered for system testing and to HRM for user acceptance testing with fewer defects.

5.9.1 Related Objective(s): Improve reporting of individual Vac/Sick Leave emp

5.9.2 Related Measure(s): Report in Design and develop process

5.9.3 Responsible Person: Business Systems Team & HRM

5.9.4 Target Date: FY 2007

5.9.5 Priority: Medium Priority

5.10 IR staff gained valuable knowledge:
IR staff gained valuable knowledge in email construct and generation techniques

5.10.1 Related Objective(s): Improve reporting of individual Vac/Sick Leave emp

5.10.2 Related Measure(s): Report on conducting system / user acceptance test

5.10.3 Responsible Person: Business Systems Team

5.10.4 Target Date: FY 2007

5.10.5 Priority: Medium Priority

5.11 Gives employees view of their Vacation/Sick Leave : Gives employees view of their Vacation/Sick Leave status on a scheduled process. Continue to insure that monthly emails go to active employees

5.11.1 Related Objective(s): Improve reporting of individual Vac/Sick Leave emp

5.11.2 Related Measure(s): Report on Automated reptng of ind Vac Sick Leave

5.11.3 Responsible Person: Business Systems Team & HRM

5.11.4 Target Date: FY 2007

5.11.5 Priority: Low Priority

5.12 Sign-off for IR, user testing, move to production: Sign-off for IR and user testing. This was an enhancement provided by the ePrint software vendor for FY 2006 that added new features and functionality.

5.12.1 Related Objective(s): Implement upgrade-vendor electronic print software

5.12.2 Related Measure(s): ePrint software upgrade installation report; Test software upgrade

5.12.3 Responsible Person: Business Systems Team

5.12.4 Target Date: 2nd quarter 2006

5.12.5 Priority: Low Priority

5.13 Monitor production to insure system is stable: Monitor production to insure upgrade to ePrint system is stable and system is fully operational.

5.13.1 Related Objective(s): Implement upgrade-vendor electronic print software

5.13.2 Related Measure(s): ePrint software upgrade installation report

5.13.3 Responsible Person: Business Systems Team

5.13.4 Target Date: FY 2007

5.13.5 Priority: Low Priority

6. Analysis:

6.1 Program/Unit Strengths:

6.1.1 Objectives/Outcomes Exceeded or Met: Business Systems IR team demonstrated ability to gain valuable new IT skill sets related to UNIX and Oracle computing environments and web-enabled applications that will serve the team well in future ERP projects within Business Affairs that will support the UTD mission in advancing excellent education and research programs for students, faculty and staff.

6.2 Program / Unit Weakneses:

6.2.1 Objectives / Outcomes Partially or Not Met: With the pause in the Business Affairs ERP project, the Business Systems IR team will need to obtain refresher training and will need to undertake smaller process improvement projects that will utilize these newly acquired skill sets.

7. Report:

7.1 Executive Summary:
The Business Systems IR group participated in the University ERP project by assisting with planning, setting up technical training for IR staff and participating in all scheduled training conducted by the vendor in support of the HRM, Finance and Budget ERP products. In additional to the ERP efforts, the staff continued with support and maintenance of the legacy systems for Business Affairs along with instituting some departmental process improvements projects.

7.2 Top 3 Program/Unit Accomplishments:

- Developed and implemented individual Vacation/Sick Leave reporting via email
- Developed new automated, interactive subsystem for tracking Cell Phone subsidies
- Implemented Retirement Manager, a web-based ORP tracking system offered by UT System

- Developed automated tracking of TRS during the 90-Day New Hire period
- Replaced manual data entry of job parameters for scheduled jobs with automated job parameters
- Implemented PC based AP Check Inquiry application to be used by AP, Budget, and Controller for process improvement
- Implemented functions and jobs to automate transaction processing for StaplesLink
- ePrint software version upgrade
- Automated account descriptions synchronization between BIS and FRS
- Applied 37 vendor software upgrades
- Completed 187 User Work Requests
- Staff attended 300+ hours of Banner training, including UNIX and C/Pro*C, for Project QUEST ERP

7.3 Research Activities or Publications: Nothing to report.

7.4 Instructional/Training Activities (presented or received): Business Systems IR staff attended 300+ hours of
functional application and technical training in the following areas:
- Human Resources and Payroll functional training
- Finance functional training
- Budget functional training
- Oracle technical training
- UNIX technical training
- C/Pro*C Programming training

7.5 Public Service:
In order to support the University's mission statement to transform ideas into actions that directly benefit the personal, economic, social, and cultural lives of the citizens of Texas, the Information Resources Business Systems groups supports the community by:

1. volunteering to coach youth baseball and basketball

2. volunteering for the Special Olympics in the eye clinic

3. volunteering for the Brent Woodall Foundation for Exceptional Children - Walkabout for Autism

4. volunteering at the Plano TX Senior High School

5. charity volunteering at the Dallas Chinese Lions Club

5. charity participation in the Dallas Resource Center

7.6 Other External Activities: Nothing to report.

7.7 Contributions to UTD:
Provided the necessary support and maintenance to Business Affairs legacy systems for HRM, Finance and Budget for the University to carry on its day-to-day operational functions, meet its State and Federal statutory obligations in support of the University's students, faculty and staff. Provided additional level of security for students, faculty and staff to allow for added protection of confidential data and records.

7.8 Top 3 Program / Unit Challenges:
Maintain current level of support and maintenance for Business Affairs legacy systems along with development of new systems directed toward process improvement with existing staffing levels. Retain and build on IT skill sets learned during Project Quest ERP for use with new ERP effort initiated by University.