Mosaic Forum

Questions and Answers
Where did all the parking lot issues go? We raised them, were told to “hold”, then they were lost!

This is being looked into! However, the project team is tracking daily a list of issues, currently the number of issues includes (at May 29):

<table>
<thead>
<tr>
<th>Breakdown of items</th>
<th>#</th>
<th>Priority (Both mprod JIRAs and relevant MINFRA JIRAs, and Operational Items)</th>
<th>#</th>
<th>Current latest planned target date</th>
</tr>
</thead>
<tbody>
<tr>
<td># of top issues (930 call)</td>
<td>22</td>
<td>Blocker</td>
<td>3</td>
<td>June-22-14</td>
</tr>
<tr>
<td># of bugs</td>
<td>46</td>
<td>Critical</td>
<td>37</td>
<td>August-01-14</td>
</tr>
<tr>
<td># of tasks</td>
<td>46</td>
<td>Major</td>
<td>60</td>
<td>June-13-14</td>
</tr>
<tr>
<td># of enhancements</td>
<td>24</td>
<td>Minor</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td># operational tasks</td>
<td>10</td>
<td>Total OPEN JIRAs</td>
<td>119</td>
<td>August-01-14</td>
</tr>
</tbody>
</table>

The Mosaic team continues to make daily progress. Some of our items are categorized as Critical or Major – but the issue has been addressed and we are monitoring it before we close it off the list.

It should be noted that this list includes all project related items, research, finance, technical, and will include other module items in the future as well. So the list numbers may decline and grow depending on different phases of the project overall.
Will UTS get more support to help with inquiries?

Helpdesk calls are triaged to either a technical support person to respond to and close or a functional superuser inbox.

Superuser inboxes are relatively current, except AP, however more effort will go toward clearing this inbox too.

Also, it was noted that in some instances a superuser cannot clear the inquiry resulting in the creation of a “JIRA” or technical fix ticket. Superusers will notify people when this occurs so items don’t “disappear” altogether by the requestor.
People have given up on the Helpdesk ticket system. What can you say about the large number of problems that are not being addressed?

The issues are logged and prioritized. The issues list is written in a technical nature, which does not make communication of the log easy. So, two comments:

(1) Frustration is occurring because a reported issue is not resolved timely; resolution is based on priorities among other issues and the team makes daily progress.

(2) Lack of communication around the log causes a perception that issues are lost, this is not correct.

We have now resolved that the actual Mosaic issues list (log) will be posted weekly! As well, the Superuser inbox numbers, aging will be monitored and reported on weekly as well under the Finance Chair update to the Steering Committee and monthly to FFAC. Also new, when a helpdesk call has been routed to a Superuser and they cannot address it because of its technical nature at “JIRA” will be created, this results in a JIRA number being issued and tracked on the issues log. The Superuser will notify you that your issue has resulted in the creation of JIRA ###, this means the individual with access to the log, will now be able to track the progression of their JIRA (in other words track their issue to closure).
Can we expand the super user network so that knowledge translation can occur?

Yes. We need to know where more super users and for what modules this is being requested for. This will be identified at FFAC and communicated via the portal asking those interested to email: saundev@mcmaster.ca to express:

1. who would like to become a super user,
2. for what module(s).

Note: Folks will be responsible for getting approval from their local supervisor in advance.

The expression of interest should be made by July 31, 2014.
Can we create a focus group for workflow that would have representatives from each department or area that would review the problems and issues we are experiencing with the expense reports?

Yes. A call for “Finance/Research Workflow Focus Group” this concept will be discussed at FFAC and a communication will go out via the portal. If interested in being involved in this focus group email: saundev@mcmaster.ca. The call for interest will initiate May 29 and remain open until June 30.

The focus group will determine its terms of reference/scope at the first meeting. The focus group should aim to complete its recommendations within 6 months and then reconsider membership and necessity moving forward. The focus group will include Finance and Research representatives.
When will research reporting be functional?

The research reports are now developed. The reports will be rolled out to users by June 2014.
Can we have more people in travel who can answer module questions/issues? Maybe have them come to departments and train.

Knowledge transfer session for travel have recently been completed, which will aid in their ability to respond effectively to user questions.

It is possible for trainers for visit departments although we are not resourced to provide the community one to one training. If you would like to organize 5-10 people for a local training session, or have any specific questions, please contact aphelp@mcmaster.ca. Also, training will continue to be offered on a monthly basis.
There were delays in paying external suppliers/clinical preceptors who now have a negative view of the University. How will the University communicate to explain the delays and plans for improvement?

In the early days of the project payment delays did occur. End user departments, Accounts Payable, and Strategic Procurement handled direct communications to payees or vendors when impacted. Since this problem has been isolated there is no mass communication planned. If the situation arises again, a similar strategy of direct communication with impacted payees/vendors will be required.

This situation early in the project was a result of “payment vouchers” locking. There are now checks and balances in place to ensure all payment vouchers are fully processed when sent by AP. Payment Vouchers are still locking at times, the problem is identified very quickly and resolved with UTS without delay – unlike our experience early in the project.
Can communication be improved?

Communication for Mosaic has been a challenge, some indicate there is too much communication, too many places to access information, etc. Some indicate there is not enough communication.

To improve communication more information is needed. If you have improvement recommendations please send these to: mosaic@mcmaster.ca

Recent feedback is suggesting that our more detailed module specific communications are helping. We are continuing to focus on these for the Finance modules based on this feedback.
Can the Mosaic team communicate via email? People don’t have time to wade through the home page.

The Mosaic communication team receives mixed feedback on modes of communication. This request has gone to the Steering Committee and communication lead to consider. We are using email weekly. We will continue to explore scope and frequency based upon key Mosaic related issues and priorities. 

*Please note we have a % of the community indicating NO email and % of the community saying YES.*

Another survey suggests a few key communication channels are best: mass email, Mosaic website, Manager/Supervisor discussions, and training materials/sessions.
What was the purpose of setting up 30,000 program codes for fund 20?

To ensure we had good data quality we had to ensure we had the same number of digits in chart fields. Easier to always put a program or project with same number of digits in chart fields for an I/S account. Risk of combo-edit/data missing for reporting.
What are the government and oversight reporting gains we keep hearing will come from Mosaic?

The gains are information and reporting related once all modules are live. Reporting gains come from an integrated data environment, as well as from our longer chart of account string. McMaster, like other Ontario or ERP University’s adopt longer account strings because it allows for better reporting capabilities.

Business intelligence reporting and dashboards are a phase 2 focus, much more information will come on this initiative in 2015/16.

Ideally more developments will occur on the Mosaic portal – allowing us to long on and see My Work, My Research, etc. and with business intelligence implemented we can then further build our dashboards of information relevant to us. Our accounts, our projects, and other key dashboard indicators we want to follow.
What specific changes are being implemented for the other Mosaic rollouts based on the issues identified with the initial Finance rollout?

The timeline is different for the Hyperion, HR, and Student modules.

**Hyperion** is planning a smaller staged roll-out, using lessons learned from Finance:

- **Phase 1** will involve using Hyperion for reporting 2013/14 variances.
- **Phase 2** focus on Faculty and a few Provost departments only for the 5 month review process (no 5 month review for Administration)
- **Phase 3** focus on folks who perform the 8 month projections & 15/16 budget process.

**HR** is planning an increased number of super-users (50+) learning the system through user acceptance testing and is focused on training materials through UPK development.

More to come on the student rollout.
Why is there not more customization with Mosaic which would increase productivity?

A key project principle of Mosaic was that McMaster would not customize wherever possible because of the associated costs with customizations and ongoing updates required each time the system upgrades occur.

Because of this principle the project funding is based on a non-customized software implementation.
Has Mosaic been on/over/under budget? Why?

The Mosaic budget is tracking on budget and is reported upon routinely at Finance Committee.

A project cost to completion report is used to track approved costs.
Has McMaster’s Mosaic implementation been more/less difficult than other University’s system change?

This is a judgment related question. Based on discussions with other Universities where Finance modules have been implemented McMaster’s implementation includes “more” modules that went live than others at a point in time and appears to have involved less issues. However, no large scale system change is easy and many Universities engaged in this discussion identify difficulties McMaster did not experience.
Most of the negative feedback about PeopleSoft is from faculty who are unwilling to use the system. Is there a plan for senior administration to provide messaging to faculty?

The Steering Committee has collected survey comments from Faculty recently and will take the lead on an action plan to address Faculty feedback. This action plan will be presented to the Executive Committee (involving the Provost, VP (Research), VP (FHS) and VP (Administration)) for endorsement and support.
Who do you expect to use the system? What are your thoughts on sharing log-on passwords?

Anyone with a transaction related responsibility, whether it is submitting a transaction request or approving one, is expected to use the system. **Sharing log-on passwords is not acceptable.**
Appendix A

Survey Results for Strategic Procurement & AP from April 22, 2014 Financial Conference
69% Approve of the new P-card Limit.

However, other survey feedback suggests some areas desire and need lower limits. Lower limits is possible.

**Action 1:** The P-card form will be modified asking individuals if they would like a lower limit for their card. *Owner: Austin/Angelo*

**Action 2:** A communication to existing holders will go out to explain the limit was set at $50,000 based on community requests, however individuals may request a lower limit on existing cards by contacting purchasing. *Owner: Austin/Angelo*
62% identify P-card a good replacement to Systems Contracts

However, we still have work to do on P-card reconciliation, data currency, and training!

*Action 1: P-card Reconciliation and currency issues are on the top priorities list and tracked there. Owner: Terri*

*Action 2: Need to improve update training materials for P-card processes – perhaps ready in time for the launch of the P-card limits communication? Owner: Terri/Austin/Angelo*
53% are unhappy with P-card reconciliation!

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52% are unhappy with purchase orders/approval process!

We have work to do! Training, piloting a shared service centre, re-examine approvals in workflow.

**Action 1:** Update training materials, screens to match the live environment. **Action:** Systems support team TBD target fall.

**Action 2:** Examine approval process in the Finance/Research Workflow focus group.

**Action 3:** Explore shared service centre for low frequency processing needs
58% Agree to reduced time and more efficiency

Do we need to take action with the other 42% at this stage of focus on the other actions e.g. P-card related.

Options – communication rationale

Fundamentally, community members have requested a customization here to notify them of the system issuing the PO – do we need to add this onto our official “wish” list for phase 2 of the project?
67% like the tracking transparency for requisitions!

However 16% report no change – technically in the old system the only way to track an item as emails and phone calls to Strategic Procurement folks – so system transparency with Mosaic is real and very different.

Communication of this message may help – but not a top priority like P-card improvements needed.
54% agree non-PO vouchers has simplified payments – but 37% disagree.

We may need to do more work on training materials and communication.

*Action 1: Update training materials, screens to match the live environment.*

*Other? Ask FFAC Opinion*
Q17 I frequently look up the payment status (i.e. cheque reference) of a voucher:

Answered: 70  Skipped: 14

**Strongly Agree**: 21.43% (15 responses)

**Agree**: 34.29% (24 responses)

**Disagree**: 28.57% (20 responses)

**No Change**: 15.71% (11 responses)

55% agree and use this functionality and 29% disagree

Do we need to take any action with this? We will explore a tip sheet on this topic.
Q18 I find the ability to view where an expense report is sitting in the workflow has increased my efficiency in responding to queries from the employees and faculty I support:

Answered: 70  Skipped: 14

70% AGREE!

Although it is concerning that 19% of respondents disagree.

Need to review training and communication around this – is this an area where a video style tip of the day might help?