Friends of the Family (FoF) Program
Bi-Weekly Meeting
August 13, 2013

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- **New participants please share:**

  - ❑ **Name**

  - ❑ **Company**

  - ❑ **Position**

  - ❑ **What are you hoping to gain by participating in the FoF Program?**

HELLO
my name is

FoF Program Meeting
Agenda

TOPIC	PRESENTER(S)	TIMING
Welcome and Introductions • *Any NEW Participants Introduce Self*	Scott Mims	5 minutes
Review Meeting Agenda and Outcomes	Scott Mims	5 minutes
Review Meeting Rules of the Road	LJ Moody	5 minutes
Navigation of Compass Website	Ann Quaid	10 minutes
FAQ Tracking Tool • *Overview* • *Walk-Thru*	Latisha Williams	10 minutes
Top UT1, UT2, and UT3 Changes	Scott Mims	15 minutes

Next Steps and Wrap-Up:
• *Suggestions for Bi-Weekly Meetings*
   • *Topics*
• *Review Any Action Items*
   • *Parking Lot*
   • *Confirm Who, What, and By When*
	LJ Moody	10 minutes

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FoF Program Meeting
Outcomes

During today's meeting we will:

Review Compass Portal Project Website

- **Navigation to website**
- **Website contents**

Review Compass Portal Project FAQ Tracking Tool

- **Overview**
  - ***Purpose***
  - ***Process***
- **Walk-Thru**

Review Top UT1, UT2, and UT3 Changes

- **What is *NOT* changing?**
- **What is changing?**

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To ensure our meetings are productive:

- Meeting is being recorded for playback
- Encourage everyone to participate - *your input is very important!*
  - *Meeting intended to be interactive*
- Request one person speaks at a time
- Request no side conversations
- Please put phone on mute to eliminate background noise
- Please do not put the call "on hold" – we might hear music
- Please turn-off cell phones and other forms of technology during meeting
- Facilitator will help us stick to the agenda
  - ❑ *Other issues noted in* **Parking Lot** *(this is considered a way to "park" the other issue to be discussed for follow-up at a different time)*
- Please consider all ideas and feedback
- Facilitator will help us start and end on time

Compass Portal Project Website

FoF Program Meeting
Project Website

Portal project related updates will be posted on the Compass section of the University Land's website **www.utlands.utsystem.edu**:

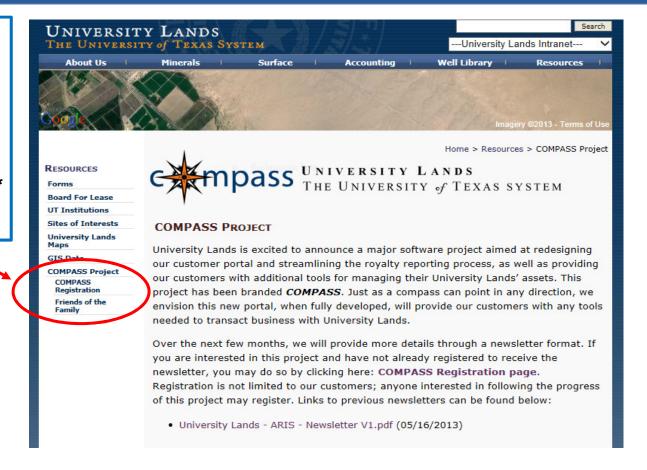Click on *Resources* drop-down and select *Compass Project*.

There are two ways to access Compass Portal Project specific information. The 1st way:

From the Compass Project landing page, access the *Compass Registration* or *Friends of the Family* pages.

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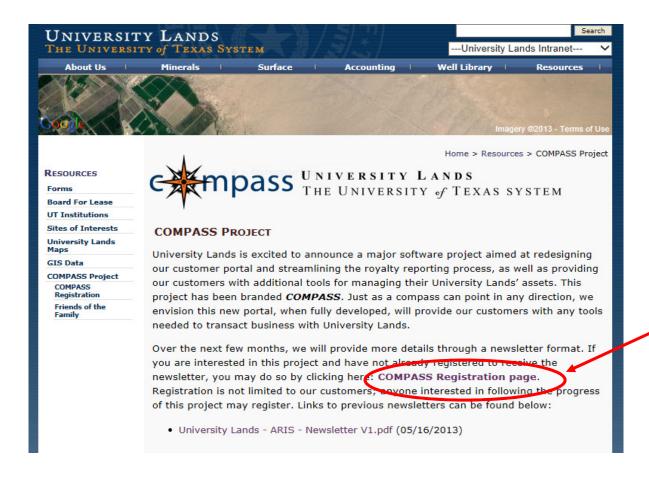**The 2nd way to access Compass Portal Project specific information:**

From the Compass Project landing page, click on the *COMPASS Registration page* link.

FoF Program Meeting
Project Website

Individuals can register to receive Compass related communications:

Click on the *Compass Registration* link to receive newsletters and updates.

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Compass Communications Distribution List Registration requires:

To register, provide all the requested information.

Each customer may have multiple team members registered to receive communications.

Customers can select multiple Contact Types.

Please complete the requested information below and click SUBMIT in order to be included on the newsletter distribution list.

Company Name *		RRC Operator #	
Contact Name *	Rectangular Snip	Job Title	
Phone (10 digit)		Email *	
Address *		City *	
State *	Texas	Zip Code *	

Contact Type *
- ☐ IT
- ☐ UT1 Reporter
- ☐ UT2 Reporter
- ☐ UT3 Reporter
- ☐ Security Master
- ☐ Supervisor
- ☐ Software Vendor
- ☐ Other

Once all data is entered, click on *Submit*.

Submit

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FoF Program Meeting
Project Website

Friends of the Family Program materials are accessible by:

To access information shared through the Friends of the Family Program, click on the link.

FoF Program Meeting
Project Website

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To view Friends of the Family meeting presentations and playback:

This page will be updated after each bi-weekly meeting date.

All customers are welcome to review the meeting materials and/or the meeting playback by clicking on the appropriate link.

Each bi-weekly meeting will be recorded for playback.

Maps
GIS Data
COMPASS Project
  COMPASS Registration
  Friends of the Family

Program Goal

The goal of the Friends of the Family (FoF) Program is to engage a selected set of Operators and Payors in the *Compass* portal development and implementation efforts to ensure early adoption of the new tools and reporting process changes. Participants will serve as the representative "voice of the customer" as we progress toward go-live.

The Role as a Program Participant

- Initially, participants can expect 2-4 hours per month involvement
- FoF Program participants meet bi-weekly (via conference call) to address project status, communications and training needs, and to share feedback with each other on tools and process.
- Participants serve as the project Sponsor within their organization to:
  - Be an advocate for the new tools and process
  - Share project communications with team members
  - Solicit feedback and questions from team members
  - Help the project team identify and track FAQ's and issues/concerns
- Provide feedback on design concepts around reporting functionality
- Provide feedback on proposed project communications
- Review quality of their company's converted data
- Participate in testing of new tools, functionality and process

Past Meetings

July 2013

Title: Compass - Friend of Family Kickoff
Date: 7/23/2013 **Time:** 1:30 PM **Duration:** 1h 7m

- **Presentation Link** • **Presentation Slides** (PDF) • **Presentation Notes** (PDF)

Compass Project FAQ Tracking Tool

FoF Program Meeting
Project FAQ Tracking Tool

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To access the Compass FAQ Tracking Tool:

Access the Compass FAQ site at
www.xxxxxx.com. Existing users can
enter their *Login Name and Password*.

1st - Enter
Login Name

2nd - Enter
Password

☐ Remember | Login | Register

COMPASS Q&A

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3rd – Click on
Login

First-time users must
register to create a
Login Name and
Password.

Click on *Registration*
to proceed.

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Project FAQ Tracking Tool

To register for a Login Name and Password:

☐ Remember | **Login** | Register

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Questions   Ask a Question

To register, provide all the requested information.

Each customer may have multiple team members registered to access the site.

Register as a new user

Username:

Password:

Email:

Privacy: Your email address will not be shared or sold to third parties.

Register

Welcome to Compass Q&A, where you can review the answers to questions about the University Lands Compass system. If you have a question, you can ask it here, or send it to ULNews@utsystem.edu.

Users can always send questions to the ULNews mailbox.

Click on *Register* to complete the process.

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![University Lands Compass logo]

FoF Program Meeting
Project FAQ Tracking Tool

To access all posted questions and answers:

To review all questions and answers, click on the *Questions* **tab.**

This opens the display of both published answered and unanswered questions.

Hello qadmin (0 points) | My Account | My Updates | Logout

COMPASS Q&A

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Questions   Ask a Question   Admin

Recent   Hot!   Most Votes   Most Answers   Most Views

Recent questions

1 answer   **Will I be able to submit PPA's via an upload?**
asked 9 minutes ago by qadmin

1 answer   **When is the planned go-live date for the new Compass portal?**
asked 11 minutes ago by qadmin

Help get things started by **asking a question**.

Welcome to Compass Q&A, where you can review the answers to questions about the University Lands Compass system. If you have a question, you can ask it here, or send it to ULNews@utsystem.edu.

Send feedback   Powered by Question2Answer | Snow Theme by Q2A Market

FoF Program Meeting
Project FAQ Tracking Tool

To submit a question to the project team:

To submit a question to the Compass Project Team, click on either link.

Either opens the *Ask a Question* entry screen.

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To enter a specific question:

Questions   **Ask a Question**   Admin

Ask a question

Welcome to Compass Q&A, where you can review the answers to questions about the University Lands Compass system. If you have a question, you can ask it here, or send it to ULNews@utsystem.edu.

Type your question in the space provided. There is a character limit of 120 for this field.

The question in one sentence:

If you need additional space or want to provide more detailed information, use this field.

More information for the question:

Users can elect to receive an e-mail when their question is answered.

Click on *Ask the Question* to submit.

☑ Email me (cmeans@utsystem.edu) if my question is answered or commented on

Ask the Question

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To determine if your question was already submitted:

Before submitting a question for response, the user can check to see if another user already submitted the same question.

Sample of question submitted for response.

Ask a question

Welcome to Compass Q&A, where you can review the answers to questions about the University Lands Compass system. If you have a question, you can ask it here, or send it to ULNews@utsystem.edu.

The question in one sentence:

When will Operators be able to review technical specs for the new system?

Before proceeding, please check your question was not asked already:
When is the planned go-live date for the new Compass portal?
Will I be able to submit PPA's via an upload?

More information for the question:

Our IT team needs to review technical specs as soon as possible to ensure we have time to make any programming changes on our end.

☑ Email me (cmeans@utsystem.edu) if my question is answered or commented on

Ask the Question

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FoF Program Meeting
Project FAQ Tracking Tool

To search the database for specific topics:

A partial list of search results is displayed.

Users can search the FAQ database by entering the topic into the *Search* box.

Hello qadmin (0 points) | My Account | My Updates | Logout

ppa's

COMPASS Q&A

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Questions   Ask a Question   Admin

Click to display the entire list of questions related to the selected topic.

Search results for ppa's

1
answer

Will I be able to submit PPA's via an upload?

asked 23 minutes ago by qadmin

To see more, click for the **full list of questions**.

Welcome to Compass Q&A, where you can review the answers to questions about the University Lands Compass system. If you have a question, you can ask it here, or send it to ULNews@utsystem.edu.

Send feedback

Powered by Question2Answer | Snow Theme by Q2A Market

FoF Program Meeting
Project FAQ Tracking Tool

To logout of system:

Click *Logout* to
exit the system.

Hello qadmin (0 points) | My Account | My Updates | Logout

COMPASS Q&A

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Top Compass Portal and Process Changes

There are many data elements and functionality that are *NOT* changing with the launch of the UL Compass Portal:

Data Elements and Functionality Not Changing for:

UT1's (Oil Production Reporting)

UT2's (Gas Production Reporting)

UT3's (Royalty Payment Processing)

- Monthly UT1 and UT2 reporting dates (5th and 15th) are not changing
- Core reporting data requirements are not changing, nor are the rules and regulatory requirements for reporting – UL is strengthening some of the data validations
- Royalty reporting will continue to be reported at the UT Lease and RRC Lease level. The lease numbers are not changing
- Penalty & Interest application remains the same
- Customers will retain the ability to report on-line or upload a CSV file
- Customers will retain the ability to have an agent report on their behalf
- Cash payments must still match the UT3 payment detail
- Customers will have access to historical data (converting past 10 years)

There are many exciting changes coming with the launch of the UL Compass Portal:

Planned Changes for:

UT1's (Oil Production Reporting)

UT2's (Gas Production Reporting)
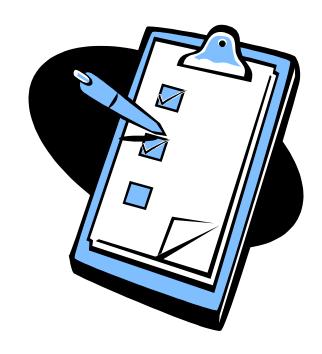
UT3's (Royalty Payment Processing)

- Improved look and feel of on-line data entry (more like Excel) – instead of one screen per lease user will see a grid view with a row for each UT/RRC lease
- UL will provide an Excel template Customers can use for uploads
- Users will be able to view multiple UT1 and UT2 reports at the same time (e.g., ability to view all reports for a given Production Month or Lease/RRC# combination)
- Customers will be able to administer their account (e.g., add additional users, request/reset a password)
- Customers will be able to submit PPA's via uploads
- Paper reports will no longer be necessary for RRC permit reporting – ability to report by Permit # - UL will automatically flip to RRC# once it is assigned
- Customers will have the ability to correct their own UT3
- Customers will have robust analysis tools for reconciling imbalances in their Operator accounts
- If an Operator is in a multi-tract unit and only has interest in a few tracts, the Operator will not have to report "0" on tracts not belonging to them

- **Suggestions for Bi-Weekly Meetings**
  - *Topics*

- **Review Action Items**
  - *Any Parking Lot Items?*
  - *Confirm Who, What, and By When*

How do participants communicate with the Project Team?

1. The preferred vehicle is to send an e-mail to the **ULNews@utsytem.edu**.
   - ❑ The Project Team will monitor this site and route questions/issues to the appropriate team member.
     - ❑ *This allows us to provide coverage regardless of team member's individual schedules.*

2. Post a question in the FAQ database.
   - ❑ This option allows participants to enter questions/issues directly into a tracking tool.
   - ❑ *Launching later in August.*

3. Contact assigned Oil & Gas Analyst directly.

Wrap-Up