



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



## FoF Program Meeting *Introductions*

- **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 <ul style="list-style-type: none"> <li>• <i>Any NEW Participants Introduce Self</i></li> </ul>	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 <ul style="list-style-type: none"> <li>• <i>Overview</i></li> <li>• <i>Walk-Thru</i></li> </ul>	Latisha Williams	10 minutes
<b>Top UT1, UT2, and UT3 Changes</b>	Scott Mims	15 minutes
Next Steps and Wrap-Up: <ul style="list-style-type: none"> <li>• <i>Suggestions for Bi-Weekly Meetings</i> <ul style="list-style-type: none"> <li>• <i>Topics</i></li> </ul> </li> <li>• <i>Review Any Action Items</i> <ul style="list-style-type: none"> <li>• <i>Parking Lot</i></li> <li>• <i>Confirm Who, What, and By When</i></li> </ul> </li> </ul>	LJ Moody	10 minutes

## 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?**

## FoF Program Meeting *Rules of the Road*

### 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





## FoF Program Meeting

**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](http://www.utlands.utsystem.edu):

A screenshot of the University Lands website. The navigation menu at the top includes "About Us", "Minerals", "Surface", "Accounting", "Well Library", and "Resources". The "Resources" menu item is circled in red. Below the navigation menu is a Google Earth map. The main content area is divided into three columns: "About University Lands", "Information for Current Lessees", and "For Prospective Lessees".

**About University Lands**

University Lands, under the direction of the Office of Business Affairs, The University of Texas System, is responsible for managing the Permanent University Fund lands and the Trust Minerals.

► More about University Lands

**Information for Current Lessees**

Resources

- Forms and Procedures
- Additional Resources
- GIS Data

**Drilling and Development**

- Operating & Reporting Procedures
- Rate & Damage Schedule
- Rate & Damage Appeal Procedures
- Field Manual of Required Operating Procedures
- Surface Commingle Requirements

**For Prospective Lessees**

**Oil and Gas Lease Map**

- Interactive Map **New**

**Oil & Gas Leases**

- Benefits of Operating on University Lands
- Well & Production Data Collection
  - Oil & Gas Wells
  - Oil & Gas Production
- Oil & Gas Lease Sales

**Surface Leases**

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



## FoF Program Meeting *Project Website*

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

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

A screenshot of the University Lands COMPASS Project website. The page has a dark blue header with the University Lands logo and navigation links: "About Us", "Minerals", "Surface", "Accounting", "Well Library", and "Resources". Below the header is a satellite map. The main content area features the COMPASS logo and the text "UNIVERSITY LANDS THE UNIVERSITY of TEXAS SYSTEM". The heading "COMPASS PROJECT" is followed by a paragraph explaining the project's goal to redesign the customer portal and streamline the royalty reporting process. A second paragraph mentions a newsletter and provides a link to the "COMPASS Registration page". A list of links is provided at the bottom, including "University Lands - ARIS - Newsletter V1.pdf (05/16/2013)". A red circle highlights the "COMPASS Project" and "COMPASS Registration" links in the left sidebar, with a red arrow pointing from the text box on the left to this circle.





## FoF Program Meeting *Project Website*

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

A screenshot of the University Lands website showing the COMPASS Project page. The page includes a navigation menu, a search bar, and a main content area with a heading "COMPASS PROJECT" and a paragraph of text. A red circle highlights the text "COMPASS Registration page" in the paragraph, and a red arrow points from a text box on the right to this circle.

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THE UNIVERSITY of TEXAS SYSTEM

Search  
---University Lands Intranet---

About Us | Minerals | Surface | Accounting | Well Library | Resources

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Home > Resources > COMPASS Project

**COMPASS PROJECT**

University Lands is excited to announce a major software project aimed at redesigning our customer portal and streamlining the royalty reporting process, as well as providing our customers with additional tools for managing their University Lands' assets. This project has been branded **COMPASS**. Just as a compass can point in any direction, we envision this new portal, when fully developed, will provide our customers with any tools needed to transact business with University Lands.

Over the next few months, we will provide more details through a newsletter format. If you are interested in this project and have not already registered to receive the newsletter, you may do so by clicking here: **COMPASS Registration page**. Registration is not limited to our customers, anyone interested in following the progress of this project may register. Links to previous newsletters can be found below:

- University Lands - ARIS - Newsletter V1.pdf (05/16/2013)

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.

A screenshot of the University Lands Compass website. The page title is "COMPASS NEWSLETTER REGISTRATION". The left sidebar contains a "COMPASS Project" section with "COMPASS Registration" circled in red. A red arrow points from the text box on the left to this link. The main content area contains an introduction to the project and a list of key personnel to include in communications.

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Home > Resources > COMPASS Project > COMPASS Registration

**COMPASS NEWSLETTER REGISTRATION**

University Lands is excited to announce the implementation of a major software project that will streamline your royalty reporting and provide you with additional tools for managing your University Lands' assets. Over the next few months we will be providing more details through a newsletter format. We want to ensure that we communicate with the right people within your organization as various aspects of this project will be important to different groups and some of the changes will require advanced notice, so we need to communicate with as many key personnel as possible. Key people include, but are not limited to, the following:

- UT1 (oil) and UT2 (gas) Reporter
- UT3 (royalty payment detail) Reporter
- UT6 Annual Electronic Reporting certification
- Royalty reporting supervisor
- Accounting supervisor
- IT Manager (Very important to include)

# FoF Program Meeting *Project Website*

## 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.

<b>Company Name *</b>	<input type="text"/>	<b>RRC Operator #</b>	<input type="text"/>
<b>Contact Name *</b>	<input type="text" value="Rectangular Smp"/>	<b>Job Title</b>	<input type="text"/>
<b>Phone (10 digit)</b>	<input type="text"/>	<b>Email *</b>	<input type="text"/>
<b>Address *</b>	<input type="text"/>	<b>City *</b>	<input type="text"/>
<b>State *</b>	Texas <input type="button" value="v"/>	<b>Zip Code *</b>	<input type="text"/>
<b>Contact Type *</b>	<input type="checkbox"/> IT <input type="checkbox"/> UT1 Reporter <input type="checkbox"/> UT2 Reporter <input type="checkbox"/> UT3 Reporter <input type="checkbox"/> Security Master <input type="checkbox"/> Supervisor <input type="checkbox"/> Software Vendor <input type="checkbox"/> Other <input type="text"/>		
		<input type="button" value="Submit"/>	

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



## FoF Program Meeting *Project Website*

Friends of the Family Program materials are accessible by:

A screenshot of the University Lands COMPASS website. The page title is "FRIENDS OF THE FAMILY". The breadcrumb trail is "Home > Resources > COMPASS Project > Friends of the Family". The main content area features the COMPASS logo and the text "UNIVERSITY LANDS THE UNIVERSITY of TEXAS SYSTEM". Below this is the heading "FRIENDS OF THE FAMILY" and a sub-heading "Program Goal". The program goal text reads: "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." On the left side, there is a "RESOURCES" menu with several items. The item "Friends of the Family" is circled in red, and a red arrow points from a text box to it.

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THE UNIVERSITY of TEXAS SYSTEM

Search  
---University Lands Intranet---

About Us | Minerals | Surface | Accounting | Well Library | Resources

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Imagery ©2013 Ones/Spot Image, DigitalGlobe, Landsat, Texas Orthoimagery Program, USDA Farm Service Agency - Terms of Use

Home > Resources > COMPASS Project > Friends of the Family

**RESOURCES**

- Forms
- Board For Lease
- UT Institutions
- Sites of Interests
- University Lands Maps
- GIS Data
- COMPASS Project
  - COMPASS Registration
  - Friends of the Family**

**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.

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

# FoF Program Meeting *Project Website*

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.

- 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	
<b>Title:</b> Compass - Friend of Family Kickoff	
<b>Date:</b> 7/23/2013	<b>Time:</b> 1:30 PM <b>Duration:</b> 1h 7m
<ul style="list-style-type: none"> <li>• <a href="#">Presentation Link</a> • <a href="#">Presentation Slides (PDF)</a> • <a href="#">Presentation Notes (PDF)</a></li> </ul>	



## FoF Program Meeting

# Compass Project FAQ Tracking Tool

## FoF Program Meeting *Project FAQ Tracking Tool*

To access the Compass FAQ Tracking Tool:

1<sup>st</sup> - Enter  
*Login Name*

2<sup>nd</sup> - Enter  
*Password*

Access the Compass FAQ site at [www.xxxxxx.com](http://www.xxxxxx.com). Existing users can enter their *Login Name and Password*.

The screenshot shows the login interface for the Compass Q&A system. It features two input fields for login name and password, a 'Remember' checkbox, and 'Login' and 'Register' buttons. The page header includes the 'COMPASS Q&A' logo and the 'UNIVERSITY LANDS The University of Texas System' branding. Red annotations highlight the input fields and the 'Login' button.

3<sup>rd</sup> - Click on  
*Login*

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

Click on *Registration* to proceed.

# FoF Program Meeting *Project FAQ Tracking Tool*

## To register for a Login Name and Password:

Remember

### COMPASS Q&A

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Questions Ask a Question

#### Register as a new user

Username:

Password:

Email:

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

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](mailto:ULNews@utsystem.edu).

To register, provide all the requested information.

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

Click on *Register* to complete the process.

Users can always send questions to the ULNews mailbox.



# 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** UNIVERSITY LANDS  
The University of Texas System

**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

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](mailto:ULNews@utsystem.edu).

Help get things started by [asking a question](#).

[Send feedback](#) Powered by [Question2Answer](#) | Show 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.

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

**COMPASS Q&A** UNIVERSITY LANDS  
The University of Texas System

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.**

Send feedback Powered by Question2Answer | Show Theme by Q2A Market

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](mailto:ULNews@utsystem.edu).

# FoF Program Meeting *Project FAQ Tracking Tool*

To enter a specific question:

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

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

Click on *Ask the Question* to submit.

Questions [Ask a Question](#) Admin

### Ask a question

The question in one sentence:

More information for the question:

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

[Ask the 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](mailto:ULNews@utsystem.edu).

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

# FoF Program Meeting *Project FAQ Tracking Tool*

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.

## Ask a question

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

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](mailto:ULNews@utsystem.edu).

Sample of question submitted for response.

# 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.

The screenshot shows the University Lands Compass Q&A interface. At the top, there is a navigation bar with 'Hello qadmin (0 points) | My Account | My Updates | Logout'. Below this is the 'COMPASS Q&A' logo and the University Lands logo. A search bar at the top right contains the text 'ppa's' and a search icon. Below the search bar, there are navigation links: 'Questions', 'Ask a Question', and 'Admin'. The main content area displays 'Search results for ppa's' with a single result: '1 answer Will I be able to submit PPA's via an upload? asked 23 minutes ago by qadmin'. A yellow box highlights a link that says 'Click to display the entire list of questions related to the selected topic.' Below this link, a red oval highlights the text 'To see more, click for the full list of questions.' A red arrow points from the search bar to the search results, and another red arrow points from the yellow box to the 'full list of questions' link. A welcome message is visible on the right side of the page.



## 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

UNIVERSITY LANDS  
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## FoF Program Meeting

# Top Compass Portal and Process Changes

## FoF Program Meeting *What Is NOT Changing?*

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)



## FoF Program Meeting *What Is Changing?*

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

## FoF Program Meeting *Next Steps*

- **Suggestions for Bi-Weekly Meetings**
  - *Topics*
- **Review Action Items**
  - *Any Parking Lot Items?*
  - *Confirm Who, What, and By When*



## FoF Program Meeting *Communications*

### *How do participants communicate with the Project Team?*

1. The preferred vehicle is to send an e-mail to the [ULNews@utsystem.edu](mailto:ULNews@utsystem.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.





## FoF Program Meeting *Wrap-Up*

**Wrap-Up**