Finance System Leadership Group Meeting Minutes
July 18, 2016

Attendees: Catherine Chan, Mike Chang, Mike Glisson, Debbie Jozwiak, Karin Livingston, Keith Martin, Usha Mathew, Theresa Meneley, Laura Moseley, Tanjina Rahman, Beverly Rymer, Karen Sanders, Erika Serna, Samantha Yurus

PeopleSoft Tools Upgrade to 8.54 – Mike Chang

- The upgrade to PeopleTools 8.54 occurred on Sunday, July 17.
- A few minor issues have been reported and some have been resolved.
    - "Favorites" (shortcuts to frequently used pages) was missing but has been restored.
    - The MICR check writing font was not working but now it is.
    - UHCL reported that the approval history on vouchers is appearing twice. ES is researching.
    - Someone reported trouble using the Finance System on an Android mobile device. ES will investigate.
    - Mike Glisson reported a problem with running a query to Excel. Mike Chang will work with the DBAs to resolve the issue after business hours today, since it will involve changing the cache directory and bouncing the server, which might cause users to lose connection.

PI Portal Update – Mike Chang

- In FS91SBX, ES is using the Custom Certifying Signatory setup page to determine which cost centers are available for users to view.
- Certifying signatories have access to the cost centers in which they are listed as the cost center manager and to all of the cost centers within the departments for which they are a certifying signatory on the Account Summary page. In addition, certifying signatories have access to pull up any cost center using the Cost Center Summary page.
- Principle Investigators (faculty) only have access to the cost centers for which they are the cost center manager on the Account Summary page and do not have access to pull up other cost centers on the Cost Center Summary page.
- Mike Chang sent an email on July 15 asking users to test in FS91SBX to verify the access is correct before it is moved to FSPRD. Beverly Rymer said the Division of Research is testing and asked that some Department Business Administrator test as well.
- The next phase of programming and testing will involve verifying cost center transactions using the PI Portal.

Implementation of Grants and Related PeopleSoft Modules – Keith Martin and Beverly Rymer

- Huron Consulting was hired to assist with the implementation of the PeopleSoft Grants and related modules. Huron is providing functional leadership and assistance, while UH Enterprise Systems is making all of the technical changes.
- Division of Research, Huron, and ES is reviewing Grants-related Reports, Interfaces, Conversions, and Extensions (RICE) through September 1. Testing is scheduled for September and October. Go-live is currently scheduled for November 1.
- Mike Glisson and Karin Livingston expressed concerns about testing occurring during September and October when Accounting is very busy closing the fiscal year. Karin previously said at various time over the past two years that Accounting would not be able to conduct testing during September and October.

- Mike Glisson will request a meeting with DOR, ES, Accounting, and Huron this week to discuss further.

Concur Travel Management Software – Mike Glisson
- UH signed a three extension with Concur to use their travel management software. The contract is extended through July 31, 2019.
- Concur will conduct a "site visit" this week via two web meetings to review the UH Concur configuration and recommend changes based on best practices.

B2G Now Contracts Management Software – Mike Glisson
- UH is considering using B2G Now software for tracking payments from prime contractors to subcontractors for HUB reporting purposes.
- UH is also considering this software for tracking large ($1 million+) contracts for Board reporting purposes.
- UH Facilities also reviewed the software for possible use as a project management tool.
- B2G Now is available through a DIR contract.

Next FSLG Meeting
- The next FSLG meeting is scheduled for Monday, November 21, 2016 from 1:30 PM to 3:00 PM in room 118, ERP1.