

## Finance System Leadership Group Meeting Minutes November 16, 2015

Attendees: George Anderson, Barbara Duarte, Jean Carr, Catherine Chan, Mike Chang, David Ellis, Mike Glisson, Debbie Jozwiak, Karin Livingston, Usha Mathew, Theresa Meneley, Karen Sanders, Muhammad Soonasra, Jack Tenner, Samantha Yurus

### Travel Management System Implementation – Mike Glisson

- All UH departments began using the Concur Travel Management System on November 2, 2015. User feedback so far has been mostly positive.
- Employees who do not already have access to Concur can self-register through PASS. Non-employees are setup through a Concur Access Form, which is completed by a UH department and emailed to Finance. A future enhancement will be an online registration page for non-employee Concur setup.

### Research Modules Implementation – Muhammad Soonasra

- The PeopleSoft Grants, Contracts, and Billing modules have been loaded into FSPRD as a “silent release” meaning that they are not available to all users yet. The Accounts Receivable module will be loaded later.
- Enterprise Systems is working with the Division of Research on data cleanup in RD2K and plans to do the first data conversion from RD2K to PeopleSoft Grants by the end of January 2016.
- Enterprise Systems is working with Accounting Services and Financial System Operations to rewrite the processes for Revenue Recognition and Indirect Cost, which are currently custom processes in the Finance System, and to create a process for Cost Sharing, which is currently managed outside of the Finance System.

### Implementation of New Budget Module – Barbara Duarte

- The Budget offices are planning to run the Hyperion Planning module parallel with BDM during the FY17 Budget Cycle.
- While UH System has a site license for the Hyperion Planning module, the Data Warehouse application has 127 individual licenses, which are assigned to users across all UHS components.
- Barbara will email a list of Data Warehouse license users to the Finance System Leadership Group, along with their level of activity, so that suggestions can be made about transferring licenses from users who may no longer need access to others who need it.

### PI Portal Demonstration – Mike Chang

- At the request of the UH Division of Research, Enterprise Systems developed a financial dashboard for principal investigators (PIs) called the PI Portal.
- The PI Portal is currently available in FSPRD, but few people have been access because it is still being developed. The navigation is Custom Reports / GL / Cost Center Summary. Eventually, it will be available through PASS. Mike Chang gave a demonstration of the PI Portal in FS91SBX.
- Employees can only see the cost centers for which they are the Cost Center Manager because it is possible to drill down to see payroll information by employee. Other transactions (vouchers, journals) can be viewed on a drill down as well.

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- Though the PI Portal was originally intended for research projects, it also displays NA cost centers, so can be used by any Cost Center Manager.
- In addition to providing a user-friendly way to view current cost center balances, the PI Portal may eventually be used to document cost center verifications.

Next FSLG Meeting

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