Finance System Leadership Group Meeting Minutes
November 27, 2017

Attendees: George Anderson, Jean Carr, Catherine Chan, Mike Chang, Sabrina Hassumani, Karin Livingston, Usha Mathew, Theresa Meneley, Cris Milligan, Karen Sanders, Mo Soonasra, Jack Tenner, Samantha Yurus.

PeopleTools Upgrade from 8.54 to 8.55 – Mike Chang
- The major changes from this upgrade are:
    - Oracle no longer supports Crystal Reports. The Finance Development team is working to convert all existing custom Crystal Reports to other formats.
    - This version of Tools is fluid page enabled, but the application software must have fluid designed pages.
        - Fluid design means that the software reacts to what is being used to access the system and adjusts the visual of the page to suit the device. For example, the display would be different if the system were accessed from a desktop with a full sized screen than it would be for a tablet or a mobile phone.
        - There may not be many delivered fluid designed pages, but the Finance Development team will not know for sure until they have a development environment.
    - The menus will change to look more like Campus Solutions and HR, which are designed to be search driven rather than menu driven.
        - Mike Chang will look at finding a way to keep the classic menu
- The Database Administrators (DBAs) are currently working on preparing the upgrade, but there is an issue with conversion scripts.
- The DBA's should have a development environment and compare reports created for the Finance Development team in early December.
- The Finance Development team will need approximately 2 to 3 weeks to review the compare reports and do retrofits for customizations. This timeline will be extended if modifications or enhancements are needed or requested for fluid pages.
- User testing is currently expected to begin in mid- to late- January of 2018, and will last between 1 and 2 months, depending on the number of fluid pages and other issues.
- Go-live is currently expected to be in March of 2018, depending on testing.

Timeline for Upgrade to 9.2 – Mike Chang
- The DBAs have secured servers and space.
- The DBAs can begin their initial pass when the PeopleTools 8.55 development environment is created; this is estimated to be in early December.
- The basic steps for the upgrade are as follows:
    - DBAs perform an initial pass and conversion to upgrade a copy of production to 9.2. This generally takes approximately six months.
    - DBAs generate compare reports.
    - The Finance Development team reviews the compare reports to identify and retrofit customizations. Historically this process takes between 3 and 4 months, but could be longer as 5 new modules have been added to Finance for the Grants suite.
    - Functional users perform testing which is generally 3 to 4 months.
- This upgrade will have changes in functionality that could be beneficial but may require process changes.

Other Items

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- The Finance Development team is working on converting Crystal Reports to other formats, but requires assistance to determine whether reports are still needed and who should be responsible for testing. Mike Chang will email the list of reports and last known user to Karin Livingston, who will coordinate with departments at UH, UHCL, UHD, and UHV to identify who is responsible for testing.
- The Division of Research has many custom reports that need to be converted from Crystal. Cris Milligan will provide a list of these reports to Mike Chang.