Finance System Leadership Group Meeting Minutes
April 24, 2017

Attendees: George Anderson, Jean Carr, Catherine Chan, Mike Chang, Barbara Duarte, David Ellis, Mike Glisson, Debbie Jozwiak, Karin Livingston, Keith Martin, Usha Mathew, Theresa Meneley, Cris Milligan, Beverly Rymer, Muhammad Soonasra, Samantha Yurus

Implementation of Grants and Related PeopleSoft Modules – Beverly Rymer
- Phase 2 implementation is in process. Accounting Services, Division of Research, Enterprise Systems, and Huron Consulting are working closely together to complete Phase 2.

Transition from Stat to Phire – Mike Glisson
- In March, identified Finance System users at each campus were given access to Phire, which will be used to log issues (Finance System problems and suggested changes) and to document solutions, testing of solutions, and movement of solutions to production.
- Stat, the previous system used, will remain available through April 30, 2017 for users to view, in case they need to refer to any CSRs in Stat that need to be re-entered in Phire.

Contracts Demo in Purchasing Module – Mike Glisson
- Mike Glisson will schedule another demo of the PeopleSoft Purchasing module that focuses on contract fields and functionality within the module, which are currently not being used.
- The purpose of the demo is to give us enough information to start testing the use of these fields and to determine if more fields are needed for contract management and reporting.
- Mike obtained a list of individuals at each campus who would like to participate in the demo.

Upgrade to 9.2 – Mike Glisson
- Beyond the current implementation of Grants and possible modifications to the Purchasing module for contract reporting, the next major project involving the Finance System will likely be the upgrade from 9.1 to 9.2.
- Additional PeopleSoft modules that we may purchase and implement in the future, such as eProcurement and eSupplier Connection, require that we upgrade to 9.2 first.
- The earliest window for a 9.2 upgrade would be December 2017. If that is not possible, the next probable window for the upgrade would be February or March 2018.

Next FSLG Meeting
- The next FSLG meeting is scheduled for Monday, July 17, 2017 from 1:30 PM to 2:30 PM in room 118, ERP1.