Finance System Leadership Group Meeting Minutes
June 16, 2014

Attendees: Cathy Bye, Jean Carr, Catherine Chan, Mike Chang, David Ellis, Mike Glisson, Margie Hattenbach, Debbie Jozwiak, Keith Martin, Usha Mathew, Theresa Meneley, Jack Tenner, Samantha Yurus

PeopleSoft Maintenance Packs – Mike Chang
- The functional groups have been testing the application of maintenance packs 2-12 in FS91SBX2 over the past several weeks and logging issues in the SharePoint site.
- About 30 issues were identified during testing, and 4 or 5 remain that should be resolved this week.
- The maintenance packs will be moved from FS91SBX2 to FS91DEV on June 23 where ES will apply the retrofits.
- ES will refresh FS91TST from FSPRD and apply maintenance packs the week of July 7. Exact timing will be determined once FS91DEV has been completed., The functional groups will test again and log any issues in the SharePoint site. Catherine will create a new folder in the SharePoint site for FS91TST testing feedback.
- If testing goes well in FS91TST, the maintenance packs will be moved to FSPRD on July 20 or 27.

Email Notifications – Mike Chang
- Mike Chang will email the FSLG a template for email notifications that result from Finance workflow, self-service changes in PASS, and AP employee direct deposits.
- Each campus can determine the signature used in emails sent to users on their campus for Finance workflow. The email subject and body can be modified without technical assistance but will be used by all campus. Treasury or UH Accounts Payable will determine the content of emails sent for AP direct deposit and self-service changes in PASS.
- The email notification changes will be tested in FS91SBX, moved to FS91TST, and then to FSPRD when ready. Alternatively, it may be tested in FS91TST as sandbox is refreshed weekly.

Research Modules Implementation – Keith Martin
- The technical group that was previously in the Division of Research is now part of Enterprise Systems but continues to support the research modules. Muhammad Soonasra, who reports to Keith Martin, is the manager of the group.
- ES has been running InfoEd for Pre-Award parallel with Cayuse since November 1, 2013. Cayuse contract will expire on 09/30/2014. InfoEd version 13 is implemented at UH and InfoEd Pre-Award module in version 13 is very unstable. Users are having submission issues and lately every submission requires a patch in order for submission to go to Grants.gov. DOR and ES are planning to upgrade InfoEd to version 14 in order to address submission issues.
- ES is having a difficult time with InfoEd Compliance. InfoEd compliance modules are not fully developed. DOR compliance group is reluctant to continue the implementation of these unstable modules. DOR and ES are collaborating to research other vendors to find more reliable solutions. InfoEd Tech Transfer and Intellectual Property modules were initially scheduled to be implemented in August or September 2014. Due to the current InfoEd

version instability and upgrade planning to V14, the implementation of InfoEd Tech Transfer modules is on hold.

- Due to a change in federal requirements, it may not be necessary to utilize Maximus to document Time & Effort Reporting. ES is looking into the possibility of using the HR System instead.
- The following post-award modules will be implemented first: Billing, Project Costing, Receivables, in order to reduce the amount of uncollectable receivables. These modules are due to be implemented by December 31, 2014. The Contracts and Grants modules will be scheduled for implementation afterwards.
- ES will create a portal for principal investigators, probably in PASS, that will give them a snapshot of their cost center budget and activity. ES is waiting for specifications from DOR.

Travel Management System Implementation – Mike Glisson
- UH and UH Downtown will implement the Concur Travel and Expense module in mid to late July depending on how end-user testing goes over the next couple of weeks.
- End-user testing was delayed a few weeks primarily due to a delay in receiving a valid file of credit card charges from Citibank to use for testing.

Next Meeting
- The group will meet again in September.
- Mike Glisson will schedule the meeting in Outlook.