

Finance System Leadership Group Meeting Minutes July 17, 2017

Attendees: George Anderson, Jean Carr, Catherine Chan, Mike Chang, David Ellis, Mike Glisson, Sabrina Hassumani, Debbie Jozwiak, Keith Martin, Usha Mathew, Theresa Meneley, Cris Milligan, Beverly Rymer, Cecille Scardino, Muhammad Soonasra, Jack Tenner, Samantha Yurus

Timeline for Upgrade to 9.2 – Mike Chang

- Mike Chang will talk to the Database Administrators (DBAs) to determine the availability of DBA staff and equipment to perform the Finance application upgrade from 9.1 to 9.2.
- Basic steps in the upgrade include:
 - DBAs perform an initial pass to a copy of production, which could take six months.
 - Enterprise Systems (Mike Chang's and Muhammad Soonasra's groups) review UHS customizations and recreate them in an upgraded environment, which normally takes about three months. It might take longer since the Finance System now includes five additional modules related to grants management.
 - Functional users perform testing in an environment that has been upgraded to 9.2 and retrofitted with UH customizations, which normally takes three months. Before testing starts no additional modifications (other than required fixes) will be made to production until after the upgrade is completed.
- Therefore, the 9.2 application upgrade may not be ready for production until July 2018 at the earliest. Mike Chang said that upgrading before year-end or after year-end close is a business decision.
- Prior to completing the application upgrade (during the initial pass or retrofit creation), PeopleTools must be upgraded from 8.54 to 8.55. Impacts from the Tools upgrade include:
 - Custom UH Crystal reports (about 15 of them) will no longer work, so ES will need to rewrite them, if they are still needed.
 - nVision reports will continue to work. ES will look to configure nVision to run on Lynx Servers, in order to retire the PSNT server. Some pages in Finance will appear in the fluid user interface format, rather than the classic interface format in 8.55. Keith Martin suggested that we turn off the fluid user interface in Tools 8.55 until the application upgrade to 9.2 is completed because that is when the fluid user interface is fully functional.
- According to Oracle, version 9.2 should be the final upgrade. Future updates will be applied quarterly as patches but will not require as much time or effort to test and implement.
- Mike also said that Lynx 7 web servers will be installed on July 23, 2017, which should be transparent to users.

Implementation of Grants and Related PeopleSoft Modules – Beverly Rymer

- The Grants and related modules have been implemented. Division of Research and Accounting Services are working together to finalize the conversion of fixed priced grants.
- ES is helping DOR to create additional tables in the Finance System for the new modules that can be used to write queries.

Future FSLG Meetings

- Karin Livingston will be the new Assistant Vice President of Finance and Controller at UH and will schedule future FSLG meetings.