

Finance System Leadership Group Meeting Minutes
December 8, 2008

Attendees: Jean Carr, Catherine Chan, Mike Chang, John Cordary, David Ellis, Mike Glisson, Karin Livingston, Keith Martin, Theresa Meneley, Toni Wyer

Status of Upgrade to 9.0 – The initial upgrade pass is expected to be completed within a week. The upgrade database will have UHS data (cost centers, transactions, etc.) but no UHS customizations (custom reports, custom workflow, BDM, document imaging, etc.).

After the initial upgrade pass, the DBA will complete two more practice upgrade passes – one will be the Development environment used by Mike Chang’s group and the other will be the Test environment used primarily by functional users. Major UHS customizations will be added to both environments.

A target date for the upgrade will be determined later once users have had time to work with the upgrade databases. However, the upgrade should not prevent us from moving forward on any other projects in the near future.

Other Major Projects – In addition to the upgrade, the following major projects are in process:

- BDM updates – budget officers prioritized CSRs related to the Budget Development Module and Enterprise Systems is working on them in preparation for the budget cycle
- Employee self-service for AP direct deposit – ES is working on a way for employees to elect AP direct deposit and view AP reimbursements in PASS, as well as receive email notification when a direct deposit payment is issued. ES received code from another university that is doing this already to get a head start on this project.
- Requisition workflow for UHCL – currently targeted to implement February 1, provided testing goes well

Next FSLG Meeting – The next Financial System Leadership Group meeting is scheduled for January 12 at 1:30 PM in room 249 UBP3. However, if there are no major issues or important updates to discuss, it will be cancelled. Mike Glisson will send an email either way.