

## Finance System Leadership Group Meeting Minutes December 5, 2016

Attendees: Jean Carr, Catherine Chan, Mike Chang, Mike Glisson, Angela Hartmann, Sabrina Hassumani, Debbie Jozwiak, Karin Livingston, Keith Martin, Usha Mathew, Theresa Meneley, Karen Sanders, Muhammad Soonasra, Samantha Yurus

### PI Portal Update – Mike Chang

- Enterprise Systems is doing some tuning enhancements to the PI Portal to make it faster.
- UH faculty (PIs) only have access to view their cost center information by clicking on the PI Portal icon in AccessUH. Faculty at other campuses can navigate in the Finance System to Custom Reports / GL / Cost Center Summary to view their cost centers.
- Certifying signatories at UH can view all of the cost centers in the departments for which they have signature authority by navigating in the Finance System to Custom Reports / GL / Cost Center Summary. Other campuses can give certain individuals the same security role in Finance, if needed.
- A few individuals in DOR, ES, and Finance have been given global access to view any cost center.

### Implementation of Grants and Related PeopleSoft Modules – Muhammad Soonasra

- The target go-live date for converting existing awards, projects, and contracts is January 30, 2017 (confirmed after the meeting).
- The target go-live date for Billing and A/R is February 17, 2017 (confirmed after the meeting).
- Huron Consulting will provide post-implementation support until May 31, 2017 (confirmed after the meeting).
- The Sandbox 2 database will be prepared for testing in December with most testing occurring after the holiday break.

### B2G Now Contracts Management Software – Mike Glisson

- UH is implementing B2G Now software for tracking payments from prime contractors to subcontractors for HUB reporting purposes, as well as for tracking large (\$1 million+) contracts for Board reporting purposes.
- About 20 contracts are being entered for the pilot phase of the implementation. Full implementation is expected to occur about April or May 2017, depending on how the pilot goes.
- UHCL, UHD, and UHV can also use B2G for tracking prime contractor payments to subcontracts, if desired. Maya Thornton, UH HUB Director, will contact the other campus HUB Coordinators.

### Vendor Portal Software – Mike Glisson

- Mike Glisson, Enterprise Systems, and UH Accounts Payable will look at a web demo for vendor self-service software (PaymentWorks) that allows vendors to submit address and bank information, which would be routed to UH Vendor ID for approval and uploaded to the UHS Finance System.
- The group will also review PeopleSoft eSupplier Connection, which offers similar functionality.

## Finance System Leadership Group Meeting Minutes December 5, 2016

- Providing a self-service portal for vendors is an important step in improving the efficiency of the vendor onboarding and maintenance process. It may also improve the security and reliability of information with added controls and cross-checking the IRS and other databases.

### Contract Management and eProcurement Software – Mike Glisson

- Mike Glisson will be discussing contract management and eProcurement software options with the Purchasing Directors and Enterprise Systems over the next few weeks.
- The purpose of the contract management software is to track all UHS contracts, not just the \$1 million+ contracts being tracked in B2G Now. State requirements for reporting contract information makes having a comprehensive contract management database necessary. We currently encumber all contracts on a PO, so we are using PO information to report on contracts. However, it is necessary to open the PO to gather some of the information, which makes reporting inefficient and time consuming.
- eProcurement software will help Purchasing departments create and post solicitations faster and more efficiently and make it easier for departments to place orders with preferred vendors.

### Other Updates – Mike Chang

- On December 11, 2016, ES will apply a PeopleTools patch to the Finance System during the weekly maintenance window.
- In March 2017, Campus Solutions plans to complete its upgrade to 9.2. The target date for the Finance System upgrade to 9.2 is December 2017.
- Phire will replace Stat as the software used to request and document changes to PeopleSoft. HR will use Phire first and Finance will begin using it later. Phire has a PeopleSoft front end, so it will look familiar to users and does not require additional software to be installed on the user's computer.

### Next FSLG Meeting

- The next FSLG meeting is scheduled for Monday, March 27, 2017 from 1:30 PM to 3:00 PM in room 118, ERP1.