

MEETING MINUTES – FMS/HCM USERS GROUP

MEETING INFORMATION

Date and Time: 7/8/2020 at 2:00 PM

Location: Microsoft Teams

Facilitator: Dr. Brian Bernoussi

Scribe: Karyn Horlacher

Required Attendees

FMS Functional Team: Natasha Hinton, Lori Matthews, Jennifer Mayes, Anita Zeiler

HCM Functional Team: Rohan Nilekani, Tina Sharpling

BPA Team: Kristine Doan, Todd Elia, Kelly Linder, Mike Mogg, Vini Moza, Lonnie Nealy

OIT Team: Ryan Meyers, Shivani Narain, Alan Nguyen

Optional Attendees

Amber Andrews, Neena Bhattatiry, Smita Chandra, Ansel Chetty, Trent Duncan, Wen-Yuan Kuo, Tracy Lederer, Ashwin Menon, Melody Monjazez, William Old, Kartik Polam, Scott Simpson, Ram Yennam

AGENDA ITEMS

1. Administrative – Dr. Brian Bernoussi
 - a. The FMS/HCM Users Group Meeting Minutes are posted on the FMS website under “Announcements”.
<http://www.utdallas.edu/finance/fms/>
 - b. Approval of Last Month’s Meeting Minutes.

2. FMS User Group
 - a. FMS Projects – Richard Marler
 - i. Overview of Top Priority Projects and Requests

| Labels | Key | Summary | Assignee | Status |
|--------------|---------------------------------|---|---------------|---|
| TopPriority1 | FMS-2963 OBF-280 | Academic Council - Provide a summary page for Pls/Heads showing Balances as described | Smita Chandra | Migrated to UAT. |
| TopPriority2 | FMS-3825 FMS-4014 OBF-945 | Implement Digital Disbursements Payments/ Implement all facets of Digital Disbursements | Smita Chandra | Testing. |
| TopPriority3 | FMS-4005 OBF-1302 | PaymentWorks Integration | Ashwin Menon | In progress. |
| TopPriority4 | FMS-4003 OBF-1622 | Lease Software Integration - GASB 87 Compliance | Trent Duncan | Waiting for a test file from the Planon Test environment. |
| TopPriority5 | FMS-4033 OBF-814 | Custom Form for Cost Center Requests | Ashwin Menon | On hold. |
| TopPriority6 | FMS-4053 OBF-1575 | PO Closeout Page from Spreadsheet Import | Wen Kuo | Meeting scheduled next week to discuss bugs. |
| TopPriority7 | FMS-4080 OBF-1811 | Create Check Print file for Chase bank account - File transmission | Smita Chandra | Waiting on details from Chase. |

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| TopPriority8 | FMS-4075 OBF-1721 | Enhancements to HUB Reporting Tool | Trent Duncan | Complete. |
| TopPriority9 | FMS-4073 OBF-1801 | NRUF File submission to State FY 2020 Q2 | Richard Marler | Complete. |
| TopPriority10 | FMS-2958 OBF-276 | Academic Council - ARA Enhancements | Richard Marler | Suspended. |

ii. Prioritization of Projects and Requests

| Labels | Key | Summary | Assignee | Reporter |
|---------------|---------------------------------|---|----------------|-----------------|
| TopPriority1 | FMS-2963 OBF-280 | Academic Council - Provide a summary page for PIs/Heads showing Balances as described | Smita Chandra | Joseph Izen |
| TopPriority2 | FMS-3825 FMS-4014 OBF-945 | Implement Digital Disbursements Payments/ Implement all facets of Digital Disbursements | Smita Chandra | Lonnie Nealy |
| TopPriority3 | FMS-4005 OBF-1302 | PaymentWorks Integration | Ashwin Menon | Kyra Detwiler |
| TopPriority4 | FMS-4003 OBF-1622 | Lease Software Integration - GASB 87 Compliance | Trent Duncan | Melody Monjazeb |
| TopPriority5 | FMS-4033 OBF-814 | Custom Form for Cost Center Requests | Ashwin Menon | Kyra Detwiler |
| TopPriority6 | FMS-4053 OBF-1575 | PO Closeout Page from Spreadsheet Import | Wen Kuo | Kyra Detwiler |
| TopPriority7 | FMS-4080 OBF-1811 | Create Check Print file for Chase bank account - File transmission | Smita Chandra | Lonnie Nealy |
| TopPriority8 | FMS-2958 OBF-276 | Academic Council - ARA Enhancements | Richard Marler | Lonnie Nealy |
| TopPriority9 | FMS-4101 OBF-1636 | Update Treasury forms for Petty Cash and Change Funds | Richard Marler | Lonnie Nealy |
| TopPriority10 | FMS-4062 | PeopleTools 8.58 Upgrade | Richard Marler | Ansel Chetty |
| TopPriority11 | FMS-4070 | FMS Fluid Project | Richard Marler | Richard Marler |
| TopPriority12 | FMS-4060 OBF-1458 | Accounts Payable and Purchasing would like to explore the possibility of discontinuing the export of POs created by certain forms in Jaggaer to PS. | Trent Duncan | Mike Mogg |
| TopPriority13 | FMS-2958 OBF-276 | Academic Council - ARA Enhancements | Richard Marler | Lonnie Nealy |
| TopPriority14 | | BPM Updates | | Amber Andrews |

iii. Objectives for Next Month

| Labels | Key | Summary | Assignee | Reporter |
|--------------|----------------------|--------------------------|--------------|---------------|
| TopPriority3 | FMS-4005 OBF-1302 | PaymentWorks Integration | Ashwin Menon | Kyra Detwiler |

3. FMS/HCM User Groups

- a. PeopleTools Upgrade – Ryan Meyers
 - i. Go Live: March 8, 2021
- b. FLUID Implementation – Dr. Bernoussi
 - i. <https://confluence.utdallas.edu/display/DXS/PeopleSoft+Fluid+Development+-+All+Pillars>
- c. Digital Enterprise – Ryan Meyers
- d. PeopleSoft Access Control – Shivani Narain

4. HCM User Group

- a. HCM Projects – Alan Nguyen
 - i. Overview of Top Priority Projects and Requests

| JIRA Number | Name | Overall Status | Current Phase | Forecast Availability Date |
|-------------|-------------------------------|----------------|-------------------------|----------------------------|
| HCM-1850 | Implement Extended Absence | | Implementation | Nov 2020 |
| HCM-1488 | OEB Modernization | | Construction/Validation | Dec 2020 |
| HCM-4035 | ePAR Enhancements | | Const/Valid/Implem | Aug 2020 |
| HCM-2175 | HRIS Project | | Valid/Implem | Aug 2020 |
| HCM-4022 | Manage Retirement Plan Limits | | Analysis/Design | Oct 2020 |
| HCM-545 | Hazardous Duty | | Construction | Apr 2020 |
| HCM-1804 | ePerformance Implementation | | Construction | Jan 2021 |

Legend:

Status: ● On Target ● At Risk ● Problematic

Project Phases: Request Analysis Design Development Validation Implementation

5. Other Topics and Upcoming Events

- a. Information Technology –
 - i. The next UAT refresh will occur on July 19th. Schedules can be found at FMS-3996 and HCM-4219.

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| <ol style="list-style-type: none"> 1. Quarterly refreshes for DEV 07/26/2020 (updated date) 09/27/2020 12/27/2020 2. Bi-Monthly refreshes for TST 08/23/2020 10/25/2020 12/27/2020 | <ol style="list-style-type: none"> 3. Monthly refreshes for UAT 07/19/2020 08/16/2020 09/13/2020 10/11/2020 11/15/2020 12/13/2020 |
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