DASH Focus Group - UT Health Science Center – 032725 – Minutes

UT System Administration: David Miller, Luke Lybrand, Brian Dickens, Tammy Lemon, Ron Loewen

UTHSC: Raaj Kurapati, Mike Ebbs, Benjie Harmon, George Ninan, Jonathan Lawshe, Judi Waldrip, Keysha Fuller, Wesley Byerly, Chandra West-Alston, Brenda Murrell, Terance Cooper, Ted Corey, Karen Derefinko, Ammar Ammar, Amanda Fryer, Lisa Hall, Anesha Jones, Damon Davis, Kevin Freeman, (additional attendees)

Meeting Notes

- Raaj Kurapati kicked off the meeting with introductions.
- David Miller thanked everyone for their involvement in the project and provided an overview of the last 6 years, the benefits of a cloud solution, and the opportunity to examine business processes to take advantage of functionality of cloud system.
- The UTSA group is visiting the UT campuses to identify what still needs to be done to improve the DASH environment, and to reinforce the commitment to completing this project.
- David provided the Guiding Principles, which are a way to categorize issues and enhancements and to determine when the fixes can be made:
    - Near Term – Able to use existing configuration with minor tweaks
    - Medium Term – Must adjust configuration, but it is within Oracle's current capacity
    - Long Term – Roadmap items, may be on Oracle's rollout plan
    - WOW! – The Way Oracle Works – Some things are different from the previous system/processes.
- Tammy Lemon reviewed some hot button items, including:
    - Labor Distribution
    - 9/12 Faculty
    - Department Approvers
    - Retroactive Pay
    - Payroll Deductions and Fringe Rates
- Colleges discussed procurement privileges, grant accounting, and ledger reviews.
- Team discussed security access issues that may restrict access to certain functionality, including procurement and marketplace. More analysis should be performed on access levels to ensure the right people/roles have the right level of access.
- Brian Dickens (HCM) reviewed:
    - Access
    - Reporting
    - Job Aids

- o Daily HCM meetings
- Mike Ebbs touched on several topics, including:
    - o Salaries and fringe benefits
    - o Practice plans
    - o Grant accounting
- George Ninan suggested we look at some of the IRIS workflows to see if we could replicate in DASH, for example the marketplace approvers.
- David Miller wrapped up the session. List of issues has been captured and will be addressed. Appreciate Faculty and Committee's time. This is considered a successful project, as many other institutions have abandoned their ERP solutions after spending millions of dollars. He thanked everyone for their patience. Oracle has complimented UT on our positivity and highly collaborative spirit during the project.
- Next phase of DASH will be to replace Banner, the Student Information System. UT is helping Oracle to design and build the solution, along with other institutions of higher education. Several partners, including Huron and Deloitte are on the project as well.
- Raaj closed the meeting by thanking everyone for their support and participation. The implementation is still a work in process. He recognized that our challenges may be more universal than we may have thought.

Action Items

- Provide Project Portfolio Management (PPM access and PPM reporting) job aids (Tammy Lemon)
- Provide training to all Grant Administrators, Business Managers, and departmental administrators to ensure consistent knowledge transfer.
- Review Procurement and other role access to ensure correct level of access has been granted.
- Consider creating Security Roles with the DASH access for the various positions across campus to ensure that all employees within certain roles have consistent access, for example: Grant Administrators, Maintenance Technicians, Business Managers.
- May need to identify a DASH Security Administrator/Expert who understands the DASH roles and the associated access levels, so they can vet security access requests for the campus before they are sent to UTSA Security. This Expert could also perform periodic audits to ensure least privilege is in place.
- Working on a solution that will allow Marketplace orders to be routed to Budget Holder/Cost Center manager.
- Provide a campus one-stop shop (e.g., UTHSC DASH portal) for all DASH information to ensure solutions are well disseminated. This could include module specific job aids and training videos developed by UTSA and UTHSC. For example: How to change Ship To address.
- Need a way to disseminate information from the Daily HCM/ERP meetings to the campus.
- Consider creating Teams Groups to encourage employees to ask their peers questions.