



UNIVERSITY OF  
CENTRAL FLORIDA

## Chart of Accounts (CoA) Redesign Project

### Fit-Gap Kickoff Meeting Minutes

<b>Date</b>	4/17/2018
<b>Time</b>	1:00 – 2:00 p.m.
<b>Place</b>	Skype and RP-302
<b>Attendees</b>	See attendance list (page 3)
<b>Minutes</b>	Wray

**Minutes Approved** - Not applicable

Becky Vilsack opened meeting with agenda and explanation of fit-gaps. She explained that the Chart of Accounts (CoA) Redesign project precipitated the upcoming sessions, because the Grants module (being implemented as part of Project Wahoo) requires that departments and projects be associated on transactions, something which is not possible with the current chart of accounts.

Vilsack stated the UCF Financials Next Generation project represents a complete re-engineering of the UCF Financials system.

Fit-gaps are comprised of a number of activities and decisions:

- Functionality reviews
- System configuration decision points
- Previews of new and upgraded functionality
- Evaluation of existing modifications

Fit-gaps also include business process review and revision discussions, but not process development.

Identified gaps will be logged and resources assigned to address those gaps. There are a number of integrations to other campus systems that will need to be addresses.

Fit-gap goals:

- Develop picture of requirements
- Identify mods
- Design the new process

Becky listed the FSS team members who are leading and facilitating fit-gap sessions. See PowerPoint for list. She listed the roles and responsibilities for the FSS team facilitators, and for fit-gap participants.

Becky stated that agenda items will be sent prior to the start of each meeting. She previewed the fit-gap schedule (see CoA Redesign Project website for this resource). The scheduled sessions reveal the depth of the changes that are coming to the UCF Financials system.

Becky reviewed the project's phases and activities within those phases that will occur after fit-gaps and before the UCF Financials Next Generation go-live in July 2019.

Q: Are other team members allowed to be invited if they have relevant knowledge or information?

A: Yes, but we encourage continuity of personnel between sessions as well. Send any additional requests for meeting invites to [fntrain@ucf.edu](mailto:fntrain@ucf.edu)

Q: Will fit-gap participants be made aware of system customizations during the sessions?

A: Yes, Becky stated that the FSS facilitators will point these out in each applicable session.

Q: Will DAL be eliminated?

A: No, HR's system is set up to govern PeopleSoft security, while the DAL governs spending authority.

Q: Will minutes and fit gap schedules be available online?

A: Yes, a determination will be made about posting the minutes on either the project website or a shared drive.

Q: Will today's presentation be available on the project website?

A: Yes.

Q: Are there any other consulting engagements for this project?

A: Only for the Grants implementation part of this project; all the rest is being performed with in-house staff.

# Chart of Accounts Fit-Gap Kickoff Attendance

Tuesday, April 17, 2018

1:00 - 2:00 PM

Skype Attendees		In Person Attendees	
1	Alvarado Hernan	1	Ann Boutros
2	Andrew Holloway	2	Bert Francis
3	Anthony Pierce	3	Chad Macuszonak
4	Becky Moulton	4	Cristy Trask
5	Bradley Smith	5	Dorann Mullins
6	Brenda Jackson	6	Isha Guerrero
7	Brian Sargent	7	Ivan De Sagun
8	Brian Sargent	8	Janny Colon
9	Carlos Alvarez Rivera	9	Jenna Capp
10	Debra Simon	10	Joel Levenson
11	Efraín Guzman-Carreras	11	Kelly D'Agostino
12	Elena Wilson	12	Kiran Acharatlal
13	GARCIA NESTER	13	Lynn Gonzalez
14	John Gyory	14	Mark Wray
15	Karen Cobbs	15	Meghan McCollum
16	Kristal Jackson Hale	16	Melinda Martin
17	Lashanda Brown-Neal	17	Michael Stein
18	Libby Sanders	18	Michelle Greco
19	Marcy Persaud	19	Phillip Henson
20	Marlin Amparado	20	Rebeca Richards
21	Mary Stanley	21	Rebecca Vilsack
22	Mary Williams	22	Scott Sedlak
23	Megan Carrigan	23	Shella Mercado
24	Molly Myers	24	Tera Alcalá
25	Nester Garcia		
26	Olga Arce		
27	Ozlem Garibay		
28	Patricia Kentish		
29	Pradeep Nimmathota		
30	Ray Bacchus		
31	Regino Besana		
32	Richard Strohfus		
33	Rose Carpenter		
34	Steven Omli		
35	Terri Smith		
36	Yelitza Burleson		

Total: 60 Attendees