

DASH Institutional Workgroup Committee Meeting Notes

May 29, 2025

Attendees: Brenda Murrell, Chandra West-Alston, Judi Waldrip, Jonathan Lawshe, Amanda Fryer, Keysha Fuller, Wesley Byerly, Lisa Hall, and Benjie Harmon

Other Members: Michael Ebbs, George Ninan, and Ammar Ammar

Meeting Notes:

Lisa's New Role: Lisa announced that she has accepted a position as Executive Director of Enterprise Administrative Applications at the system level. She will continue to support the Dash project, focusing on helping system and campus teams effectively use Dash for finance, HR, and facilities.

Consolidation of Reports: Judi raised a concern about the scattered location of reports in Dash. Lisa explained that while consolidation might not be possible, users can favorite reports for easier access. Amanda suggested programming reports to be sent automatically via email.

PO Status Report: Keysha mentioned that the UT System Team worked on the PO status report, which will be shared in the bottom-line next week. They are also working on a job aid to help locate the PO status report for the marketplace.

Ad Hoc Reports and Definitions: Brenda requested the addition of ad hoc reports and definitions for new staff to better understand the purpose of various reports. Lisa acknowledged the request and agreed to add it to her list.

Fusion Analytics: Chandra inquired about the status of Fusion Analytics. Lisa promised to check with Tammy and provide an update, as there have been talks about it but no recent developments.

Contingent Worker Issues: Wesley highlighted issues with the contingent worker process, particularly for research coordinators and external parties needing access to the IRB system. Chandra acknowledged the problem and suggested reverting to the previous method of sponsoring net IDs.

Faculty Concerns: Wesley expressed faculty concerns about the inability to access ledgers, control points, and the risk of losing grant money due to unclear end-of-year

processes. Chandra and Benjie discussed the need for better communication and potential solutions.

Invoice Workflow Issues: Keysha and Wesley discussed the challenges with the invoice workflow, including the need for manual intervention and the increased workload for staff. They emphasized the importance of addressing these issues to improve efficiency.

Cash and Credit Card Deposits: Judi reported issues with cash and credit card deposits not showing up in the detail inquiry. Despite submitting a ticket, the problem remains unresolved, and they need the deposits to be recorded before the end of the year.

Continuous Process Improvement: Lisa shared that her background in continuous process improvement will help prioritize and address the issues raised during the meeting. She encouraged participants to continue sharing their concerns for better resolution.

Follow-up tasks

Org Chart Update: Send out the updated organizational chart once it is available. (Lisa)

Report Consolidation: Communicate the best methods for accessing and favoriting reports to ensure ease of use. (Lisa)

Report Customization: Show Judi how to program reports to be sent automatically via email. (Amanda)

PO Status Report: Share the job aid for accessing the PO status report with the team. (Keysha)

Ad Hoc Reports: Add the creation of ad hoc reports and definitions for new staff to the task list. (Lisa)

Fusion Analytics: Check with Tammy about the status and future of Fusion Analytics and report back. (Lisa)

Faculty Ledger Issues: Email specific faculty ledger issues to Benjie and Mike for escalation. (Wesley)

Deposit Reconciliation: Send details of the unresolved deposit reconciliation issue to Mike and Benjie. (Judi)

Meeting Follow-Up: Schedule a follow-up meeting around June 4th to discuss updates and next steps. (Chandra)