

# DASH Institutional Working Group – 041425 – Minutes

**Attendees:** Brenda Murrell, Chandra West-Alston, Judi Waldrip, Lisa Hall, Jonathan Lawshe, George Ninan, Amanda Fryer, Keysha Fuller

**Other Members:** Ammar Ammar, Wesley Byerly, Michael Ebbs, Benjie Harmon

## Meeting notes

**Address Update Issue:** Team received several questions from the campus community, asking how office addresses should be updated in DASH or Planon. Chandra and Lisa discussed the ongoing issue with office address updates in the DASH. The addresses should be updated in Planon, the system of record, and then the changes will flow to DASH. However, there is no clear process as to how employees request an address change, as employees cannot make the change directly in Planon at this time. Team will invite Andrea Kolen from Space Management to the next meeting to help understand what needs to be done to resolve the issue and to determine the process and process ownership. Jonathan has included a message in the Daily Digest that changes should be sent to Andrea. Goal is to have a plan in place and communicated to the campus community by the end of April.

**Tenure Questions:** Judi raised questions about tenure data that were not included in the list sent to the system. Chandra explained that only a core group of people need to see tenure data, and they will handle it behind the scenes.

**HR Meeting on Thursday:** Chandra mentioned that HR will have a meeting on Thursday to review all the DASH HR questions submitted since the DASH went live. Each question will be reviewed and answers provided. The questions still being worked on will be addressed as well.

**Effort Certification:** Brenda mentioned that they have sent out an email about effort certification and will be doing training for primary coordinators. Chandra noted that they will respond to users once they have the steps and interface ready.

**Full List of Questions to the UT System:** The full list of HCM and ERP questions have been posted to the UTHSC DASH website: <https://uthsc.edu/dash/>

**Maintenance Issues:** George to review with Raaj and then send to Luke Lybrand at the UT System.

**Work Request System Issues:** George and Lisa discussed issues with the work request system, including problems with approving work orders. Lisa mentioned that the Work Request Landing Page system will be rewritten to improve functionality.

**Invoice and Account String Issues:** Jonathan and George discussed issues with invoices not having the full Chart Of Account (COA) strings. George explained that the only way to correct it is through adjustment entries in the general ledger. Team discussed the possibility of using COA

Aliases. George shared that his understanding of this is that COA Aliases must be created at the UT System-level or centralized.

**PlanOn Roles:** Chandra shared an email from Andrea Kolen, listing the UTHSC roles set up in PlanOn. Chandra to provide HR contacts to fill in a gap where HR manager role is not yet assigned. She will also follow up on training for the HR designees.

**Transaction Console Requests:** Keysha asked Chandra about staff members in procurement requesting the transaction console. Chandra asked Keysha to send their names, and they will ask Sherry for approval.

**Next Meeting:** Chandra to schedule another meeting for next week.

## Follow-up tasks

- **Office Address Updates:** Invite Andrea Kolen to the next meeting to help the Team understand what needs to be done to identify a process owner, develop a process, and communicate the process to campus for office address update. (Chandra)
- **Address Updates:** Follow up with Andrea to confirm the person responsible for updating addresses and ensure proper training is provided. (Chandra)
- **HR Questions Review:** Send a copy of the recent HR questions and answers to Jonathan and the team. (Chandra)
- **HR Questions Review:** Ensure that all HR questions are reviewed, and answers are provided during the Thursday HR meeting. (Chandra)
- **Effort Certification:** Follow up on the effort certification process and ensure training for primary coordinators. (Brenda).
- **Work Request System:** Look into the issue George is having with approving work requests from a single requestor. (Lisa)
- **Work Request System:** Participate in a focus group to provide feedback on the work request portal and approval page rebuild requirements. (Judi, Lisa)