

Aspire Meeting Minutes



Meeting Name:	OPB, House, Senate, LAS/PBS Staff and R2R Team
Date:	December 20, 2005
Time:	9:00 – 11:00
Location:	Room 116 Knott Bldg.
Requestor:	Aspire Team

Attendees

Name	Title	Company/Agency
Mike Alexander		Accounting & Auditing
Teresa Round		Aspire
Tim Sadberry		Senate Appropriations
Paul Bryant		Senate Appropriations
Jessica Pape		Aspire
Jaqadsesh Rondla		Aspire
Laurie Grasel		OPB
Teresa Brossette		LAS/PBS
Christina Smith		DFS Policy & Procedure
Kelly McMullen		OPB
Eliza Hawkins		House Fiscal
Cindy Kynoch		Senate Appropriations
Suresh P.		Aspire
Skip Martin		Senate Appropriations
Martin Young		Aspire
Satish Kumar		Aspire
Stanton Beazley		Aspire
Theresa Gagnon		LAS/PBS
Diana Flagg		Aspire
Sandra Chapman		DFS
David Dobbs		House Appropriations
Doug Darling		DFS
Kaye Kendrick		Aspire
Erika Roth-Prado		OPB
Nancy Quaney		Aspire
Tammy Bowman		Aspire

Aspire Meeting Minutes



Name	Title	Company/Agency
Elwood McElhaney		Aspire
Donna Vollersteen		Aspire
Ray Zaso		Aspire
Coleen Birch		TRW
Kenny Roche		LAS/PBS
Jerry Bowman		OPB/FEA



P:\Application
Software\COA\COA_

Work Products Reviewed:

Agenda:

- Define new Chartfields in Option I
- Illustrate inquiry screens, entries, edits and queries in Aspire Financials
- Illustrate the current logic being used to post the Grant's Activity ID in Aspire
- Illustrate the current logic being used to post the FSI values based upon the Grant Activity ID in Aspire financials
- Illustrate the EPM capabilities for reporting and drill-back features
- Confirm the process and timing for deriving the Funding Source Identifier (FSI) information in Aspire and providing it to LAS/PBS
- Define requirements for appropriate FSI reporting from Aspire EPM
- This process will only be available for agencies that have converted to Aspire. For agencies that are still using FLAIR as their system of record, they will continue to send LAS/PBS information outside of Aspire.
- Questions/Answers

Aspire Meeting Minutes



Decisions Pending:

Subject	Decision Pending	Due Date
Label Change for Activity ID	What degree of system modification would be needed to change the Activity ID title in the Grants module to FSI?	1/27/06
Capital Stakeholders Approval of proposed design solution	Kenny Roche asked at the end of the meeting if the OPB, House, Senate, and LAS/PBS staff present were prepared to give Aspire the approval to move forward with the proposed design. The consensus was that the group would like to take the information learned back to their respective offices for discussion. Kenny asked that this occur as quickly as possible so that ongoing progress for Aspire could continue forward.	1/27/06

DISCUSSION

Has there been a decision on how the Approp Year chartfield will be used? (David Dobbs) No, at this time that is part of the additional details that will be worked out as we move forth. Per Teresa Brossette, there are no special requirements from LAS/PBS for this field.

Regarding Combination Edits in Aspire from page 5 of Presentation:

- BE/Fund Compatibility Reqmts. – What is the level of the BE being referred to here? Per Teresa Brossette, the LAS/PBS fund compatibility is at the Fund/Agency level.
- What is the difference between Fund/Account – compatibility requirements and the Account – Fund compatibility?
- David Dobbs expressed a concern regarding the Account-Category incompatibility table. The information was obtained from the work that was done with agencies validating what current object codes were being used with what categories. This list will need to be re-reviewed. Also, per Skip Martin there are situations where parts of the list will be static but, there are also situations where the list will need to be dynamic.

Aspire Meeting Minutes



Project Types are enterprise wide however, the creation of the values involved agency input. Activity ID correlates to a funding source in the Grants module of Aspire. Per David Dobbs, so an Activity ID is equal to an FSI? Yes. More than one activity ID can be associated to an FSI.

The end user will determine what activity ID to use based on what has been set up as available options for each project. The activity ID is required for all transactions with a project number.

How much of a modification to the system would be involved to change the name of the Activity ID field in the Grants module to FSI? The Activity ID field in the grants module is being used to capture funding source information but, that is not how the off the shelf software intended the field be used. The intended use of the field is to capture activities related to a project.

There was much discussion regarding the FSI values. LAS/PBS staff will need to advise Aspire if they want to be able to view FSI 4 and 5. David Dobbs has a concern that agencies will not properly identify cash for FSI 9. Items that are currently recorded to FSI 7 and 8 would now go primarily to FSI 1. Potentially, an FSI of 4 would be a 1 and a 5 would also be a 1. This is an issue that needs to be resolved. Kenny Roche asked the group if LAS/PBS was ready to tell Aspire what is need for FSI. The general consensus was that internal discussions need to be held and the details of the FSI and how it needs to work in Aspire need to be finalized.

What will be the schedule for furnishing FSI data to LAS/PBS? This is also an area that needs further discussion. Per Teresa Brossette, the historical file will definitely need to have items moved from unallocated to the proper funding source before transferring the expenditure data file to LAS/PBS. This is a policy issue both for DFS and LAS/PBS. The DFS policy needs to ensure that the data is reallocated often enough to support federal draw downs and federal reporting.

Kenny Roche asked at the end of the meeting if the OPB, House, Senate, and LAS/PBS staff present were prepared to give Aspire the approval to move forward with the proposed design. The consensus was that the group would like to take the information learned back to their respective offices for discussion. Kenny asked that this occur as quickly as possible so that ongoing progress for Aspire could continue forward.

Martin Young and Christina Smith handed out a list for review of all policy related issues that have surfaced in the last couple of weeks during discussions with representatives from OPB, House, Senate, LAS/PBS, DFS and Aspire. This list did not reflect all design issues that had been discussed, again, the list primarily focused on policy issues. It was

Aspire Meeting Minutes



decided that Christina Smith will work with Erika Roth-Prado to schedule discussions of these items with all interested parties. Skip Martin expressed that he would like for knowledgeable Aspire and DFS staff to be included in the meetings to explain the intricate working details of items noted on the list.

ACTION ITEMS

Action	Responsible	Due Date
Send Teresa Brossette a list of Activity IDs and how they relate to FSI.	Teresa Round	1/27/06
Schedule and coordinate additional meetings to discuss action item resolution and related policy issues.	Christina Smith/ Erika Roth-Prado/Teresa Brossette/Teresa Round/Martin Young	1/3/06
Research what the difference is between Fund/Account – compatibility requirements and the Account – Fund compatibility? Why is this listed twice for combination edits?	Patti Harvey/Teresa Round	1/27/06