ERP CORE IMPLEMENTATION TEAM
Date: January 26, 2009
Location: Sparks Hall 3rd Floor Conference Room
Submitted by: Tina Flener

<u>Members Present</u>:

Jackie Dudley

David Blackburn   Brantly Travis

Stacy Bell   Linda Miller

Tracy Roberts   Anita Poynor

Josh Jacobs

<u>Members Absent</u>:

Linda Myhill

<u>Visitor</u>:

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Addresses load update: Brantly reported that the names have been put back in production. He is getting Shawn to go ahead and load the addresses which should be done today.

Version 8—De-supporting of V. 7 x 9/1/2010 update: Jackie stated that David has scheduled a meeting for February 2nd with the consultants so they can advise us on how to move forward with Version 8. Jackie informed the Core Team that Clay Stabler; our new engagement manager wants to come visit us so he may be able to enlighten us as well. Jackie said that one of IT's concern's is Version 9 is right around the corner. Jackie stated that she posed the question of is it possible to skip a Version; he is trying to find that out.

Summit update:
- *Project will cover $1250.00/person*
- *Forward copy of completed travel request to Jackie to budget funds*
  -Jackie stated she has not gotten any requests as of yet.
- *Departments on their own for travel arrangements/payments*

Brantly asked if it is the week after Spring Break. Anita confirmed that it is.

XTender (imaging) Agenda update: Jackie spoke to Ackerman on how SunGard could assist us if we opted to do the analysis session ourselves; he has not gotten back to me on that yet. David stated that we need to determine if we are going to implement XTender by the July 1st "Go Live" date; if we are, how campus wide do we intend to implement XTender initially. Lastly what applications do we want to use. David informed the Team that it comes with 18 applications which cover Finance, Financial Aid, Human Resources, and other areas. David stated the applications do need some work to be put into them. David also informed the team that you can also develop your own applications and XTender can be used outside of Banner as a document management system. David pointed out the Vendor information forms which are kept in 5 overstuffed filing cabinets are not within Banner, but we can use XTender to manage them,

and so could other departments. Tracy asked if it takes PDF files. David responded that it takes any kind of electronic file. Jackie stated that we need to determine how this will be rolled out on campus. Brantly informed the Core Team that a server would be needed for this to be rolled out and the departments would have to have the proper equipment. Brantly said he looked into some machines to see what would be the best alternative; he believes Panasonic has the lowest roll-over on machines. A low end Panasonic Scanner could be obtained for $897.00 which would do 20-30 pages a minute and a higher end Scanner for $5500 which would do 90 pages per minute. After much discussion it was decided that more information was needed on how much IT support would be needed and what kind of timeline we are looking at for XTender training.

Cognos update:

- ***Reports needed over the next few months need identified and brought to training.***
  -Jackie stated there are a couple of issues with Cognos. One is what each license gives us as in regards to what the needs of our power users will be. Jackie reported we have a Report offering coming up and we need to identify what we want done during that session; ideally reports on hand that we need at the moment.
- ***Overview and Functional workbooks need reviewed prior to training.***
  -Jackie stated that the ODS workbooks are available and it would be helpful if they got familiar with it before the training on February 23rd.
- ***30+ possible attendees for Report offering training.***
  -Jackie said another issue is space for training; we will have 30-35 people in a Report offering. Jackie thinks we can physically get that many people in the Gatehouse but it will be tight.

Workflow Production update: Brantly reported he doesn't think it's ready yet; they have to get ready for clone down to test, so they have to export all the Workflow's out. Brantly said he spoke to Sherry and Shawn about the notification security prop card being set up; the rest of it is except that notification. Jackie stated she is going to try and get the Workflow people together. David asked if they were cloning production down into test again. Brantly replied it is the first time it is being cloned. Jackie told the Core Team to inform their workers that it is being cloned so if they need anything that is on test to save it. Tracy asked if they have thought about cloning test to training before it is cloned over. Brantly stated that he thought it was a good idea and he would check on it.

Network, Service, and DB support update:

- ***Update on why staff cannot get INB/SSB thru Luminis.***
  -Brantly stated some of them are a mystery, but if they don't have a GoBiac record it is creating the problem. Brantly also reported that anyone who needs INB access will have to be on that table; if you need access please e-mail Sam or myself. Brantly believes another reason people can't get in is because the trigger fires prematurely. David questioned if that would be the cause of why when he clicks on something in Luminis and it says he doesn't have access, when he reloads it, it allows him to click on it then. Brantly speculated that that could be the reason.

- *Student access for Administrative offices.*
  -Brantly said he is still working on this, he has not had time to create the access ID's yet.

Brantly also reported W2's were printed this weekend.

Communications update: Josh was not present to report anything at this time.

Linda brought up the point that the Roundup communications that were done for the HR "Go Live"; came through incorrectly formatted, so all of the information got pushed to the next page with a link. This information was ignored, or not seen, which was a hindrance from a Support standpoint. Linda suggested that they should do a "Communication Blitz" on the campus for the Student "Go Live", due to the fact that there will be so many challenges. Linda stated that even though they want to reserve the mass e-mail communication for emergencies, this is an emergency. Jackie asked the student team what are the thoughts on communication. Anita said that they have talked with some of the Dean's from the College's; and they have suggested that there be individual meetings with each College. Tracy noted that the Dean's/College's will start advising the 2nd week of March so they will need to have this information prior to that date. Anita stated that she and Kathy talked about the timeline needed. Anita reported that the training for the advising portion starts March 1st; two weeks prior to when the Advisor's start meeting with their students. Linda stated that her main concern was student login. Anita respond that they would need to have a meeting to discuss the method that will be used to get student's to the login area. Linda informed the Core Team that they will have some Help Desk issues. Linda stated that Payroll has been Live for 3 bi-weekly periods; and last week within a 3 day period the Help Desk had 1,957. Linda said the real problem is the 8 people that were manning the phone's still missed 200 calls due to so much activity.

Luminis update:
- *Update of text on Front Page*
  -Linda stated that we need to come up with a process of when to update the front page and what exactly will be updated. Linda said it did not need to be anything elaborate, but it must be updated.

Student Team update:
- *Data Conversion update*
  -Tracy stated Data Conversion is moving forward; they got 4 tables moved into training and tested Friday. Tracy reported that Academic History is loading this week, after the Learner Records are done; and Moch 2 is in test this week.
- *GP Sync update*
  -Tracy spoke with Kathy this morning; Tracy wanted to know if there could be an update from the Student system to Prod on addresses. Tracy stated they need to be notified when it happens, then they can maintain the data from that point forward in the two systems to cut down on errors. Tracy also reported that she will need to speak to Brantly, Shawn, and Michelle on the best course of action on getting new admissions from Spring and Summer loaded into Banner. Brantly replied he would need to talk to Shawn and that they could test a GP Sync in the Training System first.

- *Consent question addition to Admissions Form-going to use?*
  -Brantly stated they will need to get with Linda to work on that this week. Anita asked if Core wanted to approve the consent statement. Jackie replied that she thought Legal needed to look at it. Anita stated she would get it sent to Theresa and the Core Team.
- *Status of new SFA release*
  -Anita reported that the 2009-2010 Financial Aid release is in production. Scott has gotten 95% through with building the tables and funds associated with the 2009-2010 year. He is waiting on the budgets for Foundation Scholarships before he can complete the actual Fund Management. Jackie asked what was causing that hold-up. Anita replied that the Budget has not been set by the Foundation yet according to Ellen, per Scott and Lori. Jackie questioned why it would be delayed. Anita clarified that it wasn't that they were delayed in getting that information out; it is that the information is needed quicker due to Banner. Jackie told Anita to send her something on when the information was needed and why so she can try to adjust their schedule.

  Anita informed the Core Team that Scott has 300 of the 900 pop cells written for selecting individuals that are eligible for scholarship. Anita stated that they have to be done individually because there are 900 separate criteria for scholarships; and it grows every year. Anita said they will do a complete testing the 1st week of February of the 2009-2010 year; but it is in production.

  Anita stated that they have a Touchnet conference call scheduled for February 2nd; she is trying to get it moved so it will not interfere with Core update. Anita reported Touchnet training is scheduled to start February 16th; Phase I will run to "Go Live" on April 6th and Phase II will "Go Live" June 29th.
- *Grades: How will we do, if not thru BlackBoard?*
  -Anita stated that if grades are not done through BlackBoard, then they will have to be maintained through Self-Service and we will need to build additional tables in Banner Student. Tracy replied that the majority of the burden will fall on the faculty and not on us. Tracy commented that if they are maintaining their grades on BlackBoard they will need to both mid-term and finals in Self-Service. Linda stated there will need to be significant training to make sure faculty is prepared.

Anita informed the Core Team that Moch 3 is scheduled for the week of February 9th. Anita stated the Dean's are recommending faculty and some staff members participate in the Moch Pre-Registration. Anita reported that Kathy is also gathering students to participate in the Moch Pre-Registration; as well as the two students who have been on the Student Team. Linda asked how many students total would participate. Anita replied that Kathy is working on getting the Agenda for training because there are only 20-25 computers at the Gate House so she has not set a number yet.

Anita asked the Core Team for clarification on some calendar dates. Anita stated that the Gate House is reserved April 6th for the first week of Registration "Go Live"; and Lynn is also scheduled to be here for consulting and training with Housing. Tracy stated she had sent Lynn an e-mail asking about this because training will be difficult while trying to work through Registration "Go Live". Tracy said she has not heard back from her yet due to she is on personal

leave at the moment. Linda suggested that the "Go Live" center be housed over by the Help Desk so the support group can communicate easily and quickly. After some discussion it was decided due to lack of computers/space that the training would need to be moved to the week of March 16th or March 30th.

Brantly reported that Phyllis starts the 2nd of February. Jackie stated she will work Monday, Tuesday, and Wednesday and is located over in David's area.

Tracy stated that Summer Registration is going to be done earlier this year due to Summer registration being done through Racer Touch and Fall being done through the Web.

Finance update:
- ***Subsystems update***
  -Brantly stated that he had said he needed two weeks to get it completed, it has been one and everything seems to be going well. Brantly reported everything on the mainframe in the Legacy Systems is being FTP'd down in the proper format. Brantly and Sam were able to solve the problem with the PC UNIX and the default set-up's; the issue now is getting it automated through Appworks. Brantly commented that there are two systems that are 3rd party; one is the Pitney Bowes Post office, the tech we had with them quite. The other is LMS, whatever format they sent me last is what they need to push on a regular basis. Jackie stated that Brantly needs to send her the format for the purchasing card. Brantly replied he would get that sent over to her.

HR update:
- ***Another "Go Live" center week?***
  -Jackie asked if we needed another week based on the last payroll issues instead of constantly getting calls. Linda replied if you see another week like before and you can free up the people that need to be involved, then you can never have too much support. Jackie stated that it won't benefit Payroll unless all of the other players are there as well. After some discussion Jackie said she would look at the timing to see if something can be set up.

Other Topics of Discussion: Tracy stated she needs to get with Sherry to see about getting access to test Luminis and when we are going to get some student channels so we can start looking at those through SSB. Brantly asked when they anticipate student channels being available. Tracy replied they are going to have to be available 1st of March, right after we load General Student Records. Brantly asked if we have that turned off in test as well, or just in production. Tracy did not know; Brantly stated he would check with Sherry.

Linda asked Jackie if she had heard anything back from Donna with all the questions that she had. Jackie replied that she couldn't find it; but she has not followed up.