

## **ERP CORE IMPLEMENTATION TEAM**

**Date: January 28, 2008**

**Location: Sparks Hall 3<sup>rd</sup> Floor Conference Room**

**Submitted by: Tina Flener**

### **Members Present:**

**Jackie Dudley  
Jim Baurer  
Phyllis Baurer  
Tracy Roberts  
Anita Poynor**

**Josh Jacobs  
Linda Miller  
Linda Myhill  
Teri Ray**

### **Members Absent:**

**-0-**

### **Visitor**

Jackie opened the meeting by handing out the agenda.

#### **Item # 1 – Subsystems schedule-Pending distribution –**

**Jackie** – The subsystem schedule is pending, but should be emailed out later today.

#### **Item # 2 – PDD – review changes for Luminis –**

Jackie indicated to PDD back on the agenda again. Tracy has added some items.

#### **Item # 3 – Data Standards version 1 distributed**

No changes received. Place on Web Site

#### **Item # 4 – Banner Password Policy draft-comments –**

**Jackie indicated that we** need to get some structure for our passwords because we are going to be loading security classes soon. Data will need protected because real vendor data and some student data will be loaded shortly and these records need secured. Much discussion has been going on about loading real employees to test with and changing their social security numbers. One alternative has been to look at loading fake employees and assigning social security numbers to them. However, assigning them passwords for approvals testing could be tricky.

Much of this problem is surrounding the definition of the Instances we are using. Phyllis and Jackie will prepare a draft definition document.

The group will continue to review the password management policy draft and revisit at next meeting.

#### **Item # 5 – Luminis –**

Content Discussion

Jackie indicated that the content management team has been meeting and out-of-the-box channels have been distributed to the core team. Jackie reminded the functional leads to start looking at these and making sure that their teams are identifying what they might need.

## **Item # 6 – General Person Table Maintenance and Security of Training Data**

Jackie reminded the team that they need to decide on a procedure on how general person data will be updated and what tables will be used. The team will also need to define who is going to update any information on the general person tables.

Anita discussed that the student team has talked about only allowing certain people in the Registrar's office and Admissions to add and change.

Jackie indicated that as soon as they load general person records that they have to figure out the best way to protect the social security numbers. Either security is developed over the forms or we wait until FGAC training and try to can block the socials that way. There appears to be a couple of different ways, but a final decision has not been made on the best way for MSU to handle this.

## **Item # 7 – Team Reports**

**Student – Anita / Jim**

**Finance – Jackie**

**HR – Teri**

**Luminis – Tracy**

**Communications – Josh**

**Network, Service & DB Support - Phyllis**

**Student** – Anita reported that Jim McCoy was in charge of putting a team together to handle Banner issues for academic scheduling. The first meeting is going to be this Friday at 10:00 a.m. in Wells Hall and will last about 1 ½ hours. Anita also reported that consulting is coming up in February. They will be working on validation tables and a lot of these tables will overlap with Human Resources. They will meet next Tuesday to see where they are with the validation table progress.

**Finance** – Jackie reported that the Finance Team is going to be loading the Chart this week. The group is under time restraints because the next round of budget worksheets are expected to have FOAPAL's on them. The team will also begin to work on some campus communication, but will work with Luminis training group also. Finance is anticipating to start training departmental staff early to mid-March and have departmental procedure documentation underway. Finance will start training campus users by late May and have late sessions after school starts in the fall.

Jackie indicated that she is somewhat concerned about how email will get into Banner.

**HR** – Teri reported HR had their kick-off training on 14<sup>th</sup> – 16<sup>th</sup>. They are now scheduled to meet every Friday at 1:00 and schedule as needed. The two big topics they are working on 1) Signature process for personnel action forms. 2) Anticipation of developing some electronic routing. That is going to have to get ironed out pretty quickly to develop any kind of system to match it before our next consultants visit on February 11<sup>th</sup> we need to have a good idea. Friday's meeting we are going to look exclusively at that process.

**Luminis** – Tracy reported that several Luminis subteams have been formed. They are starting to meet and our kick-off was Jan. 8<sup>th</sup>. The project team is meeting every Monday morning except for when we are in training. There is a technical workshop this Friday where I know that some of that with the email will come up its mainly the technical people Friday. The next big focus group is the OIG "organizational information gathering" this will consist of small stakeholders – students, faculty and staff. Focus group sessions last 1 hour 15 minutes max. She will be contacting various offices / groups on campus to participate. Next



Monday, Tuesday and Wednesday working on getting focus groups. Tracy will get in touch with all that would like to be part of the focus groups. We have several sessions for 12 different focus groups.

**Recommendation:**

- 1) The Luminis Project Team recommends that the name of the MSU portal be “mygate” and all references to logging into Internet Native Banner (INB), Self Service Banner (SSB), and our portal be referred to as “mygate”. To standardize references in all documentation, printed materials, and publications, we also recommend “mygate” (lowercase “my”, uppercase “G” and lowercase “ate”) be the official spelling and mixed-case configuration for the portal.

**Rationale:**

For years, different offices across campus have encouraged users (mainly students and some faculty) to “check their PIN” for important information. We placed many advertisements in student newspapers and across campus and in offices. Any time a student called with a question that could be answered in their PIN system, we told them to “check their PIN”. Users became familiar with this concept and the word spread. By telling users to “log on to myGate” or “check myGate”, we can further that communication and stress the importance of logging on daily for news and information, as well as performing self-service functions and/or their daily work on INB.

**Recommendation:**

- 2) The Luminis Project Team recommends that Murray State’s home webpage remain [www.murraystate.edu](http://www.murraystate.edu) and create a **prominent** link on the home page to the myGate portal.

**Rationale:**

After reviewing several universities’ websites, most had a standard home page with links off the home page to the portal. By creating a prominent link off the home page to the portal, it allows the portal users to “get there in one click.”

Some institutions, including some benchmark schools, had a log in area on their main webpage. The Luminis Project team felt that the addition of username and password blanks on the front page took away from the marketing value of the main page.

The main page should transition into the marketing side of MSU’s web presence; a separate page should house the myGate log-in area. Since the main page is going to be the marketing piece, there is no need to have established campus community members log-in at that address because the information on that page is not intended for registered users. The main page information is intended for visitors and prospective students. Individuals driven to the main page will not have a log in.

**Recommendation:**

- 3) The Luminis Project Team recommends that the Luminis portal be rolled into production in phases, with Phase I occurring June 1, 2008 to coincide with Banner Finance’s Go Live date.

**Rationale:**

The team wants to roll out a basic portal with some functionality for Finance functions. The team feels it is critical that the portal with minimal functionality goes into production at the same time the first module goes live to provide a consistent operating environment and log-in pathway for users.

Because there are tight deadlines and many policies to review and implement prior to June 1<sup>st</sup>, our recommendation is to roll out the portal in phases, concentrating on each module’s Go Live date and the necessary portal content for each module.

**Item # 8 – Future functional detailed meetings**