

## ERP CORE IMPLEMENTATION TEAM

Date: June 1, 2009

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

Submitted by: Linda Farley

### Members Present:

Jackie Dudley

Brantly Travis

Josh Jacobs

Linda Miller

Anita Poynor

Tracy Roberts

Tom Hoffacker

David Blackburn

Stacy Bell

Linda Myhill

### Members Absent:

0

### Visitor(s):

0

**Touchnet/Cashiering/AR update:** Anita reported that Non-AR went live this morning and the test has worked fine. Anita informed the Core Team that training for payment plans is starting this afternoon, E-Bills will be starting Friday afternoon, and E-Refunds will be scheduled the following week.

- ***Banner Tuition Calculation***

-Anita stated the tuition calculations are finally working and the regional discounts are working correctly as well. The drop/add process has been tested and it is working. Anita noted that the only unresolved issue is Food Service and Flex Dollar plans-- it may be a manual process to fix this issue. Anita also reported that Housing is ready to test their assignment process--general assignments have been tested but a more in-depth testing will need to be done.

**CBORD Upgrade Status:** The Core Team has discussed in the past doing a CBORD upgrade before Fall. Jackie requested that Brantly get with Beverly to confirm if the upgrade has been purchased.

**Food Service Issues:** Anita stated that aside from the Flex Dollars issue, there are some scripts that need to be written for M-Numbers to be tied to the social security numbers, and there needs to be a script for meal plans to be updated by the students, which needs to be loaded into Banner. Jackie asked when this needed to be completed. Anita replied that all scripts are supposed to be done by June 15<sup>th</sup>.

**Housing Module Update:** Anita reported that David Wilson was in the process of contacting Western Kentucky University; they use Banner for housing. Anita stated that she spoke to their IT department and they had written some web scripts to interface with Banner and that is what David is checking on.

**Handling Duplicate PIDM's Update:** Tracy stated that she has a list of 24 people with duplicate M-Numbers so far. Tracy has also collected documents and information online for how other schools handle duplicates. Tracy asked if a small group would like to get together to work out the process for duplicate PIDM's. After some discussion the group that was chosen was:

- *Purchasing: Gena Wilson*
- *Human Resources: Lisa Dick*
- *Financial Aid: Scott Lapinski*
- *Information Systems: Brantly Travis, Shawn Cooper*
- *Registrar's Office: Tracy Roberts, Committee Chairman*

**Management of sign-ons and e-mail accounts for student/employee name changes Update:** Brantly stated that the e-mail's can be changed anytime but Blackboard can only be done twice a year. People with name changes need to be sent to the Help Desk.

**Student Worker Access to Banner:** Tracy informed the Core Team that INB in Prod is working great; it has been tested and moved into Production. Tracy stated that the Registrar's Office is going to be spread all over campus for the "Summer O" registration process this weekend. Currently there are only four (4) people in the office who can do over-rides, but everyone will need the capability of Luminis in Prod by this weekend. Brantly stated he will check with Sherry to see if it works in Prod--it isn't working in Test currently. The Core Team discussed how Student Worker access to Banner would be given. After much discussion Jackie asked Tracy to e-mail out the form that they are using in Registrar's Office.

**Clone Update:** Brantly stated that Conversion Clone is scheduled for today. Clone testing needs to be scheduled with IT this week. Brantly asked the Core Team if they wanted to set a date each month for the Clone to take place. The Core Team decided that Clone's should be done as needed until after June 30<sup>th</sup> then they can re-visit having a set date.

**Reporting Recommendation:** Jackie stated that the issue is how to access data in Prod. Jackie commented that IT doesn't want users to run reports in Prod for several reasons, one of which is it may delay using the system if the running report is long. Jackie recommended having Super-users in departments to load reports into Prod and would have report studio. After much discussion it was decided that Jackie would e-mail out the recommendation to the Team to review. Brantly and Linda will also work out procedures this week. Jackie stated that Monday they will need to have something in place for next week.

**Third Party Products:** Jackie handed out the 3<sup>rd</sup> party project list. Jackie stated that they need to start setting priorities on these issues. Jackie asked the Core Team to take the handout and go over it with their areas and make notes on these things and bring it to the next meeting. Jackie emphasized the need to prioritize based upon institutional needs and not individual area needs. The Core Team reviewed the list at length.

**Luminis Text & Photo Changes Update:** The Core Team discussed that the Luminis page can be updated at any time, but has not been done recently. The Team also discussed who would be the best person/position to develop the content on this page. Linda informed the team that Sherry Lamb is the contact person in IT and that the problem is not getting the information up on Luminis but rather getting the information itself. Josh suggested adding a photo from the annual report and having the announcements from Roundabout in the meantime. Linda asked him to e-mail it to Sherry.

**Vacation Accrual Recommendation Update:** Tom Hoffacker confirmed with Jackie that vacation time above the standard will be carried over to June 30<sup>th</sup>, 2011; but ½ must be used by June 30<sup>th</sup>, 2010. Jackie informed the team that the alternative she has been working on is pay those involved for recognition of work on project rather than paying out vacation. Jackie asked the Core Team for feedback. The Team concurred that the first option was preferable. An email will be sent to those involved confirming this decision.

**Other topics of discussion:**

- Brantly stated that they will be doing a storage upgrade on August 8<sup>th</sup> & 9<sup>th</sup> which will knock out all systems. Anita brought to the Teams attention that that is when payments are due. After much discussion on possible dates it was decided that Brantly and Linda would check to see how long this could be postponed.
- Linda wanted to get feedback on the flow chart that was handed out at the previous meeting. She asked the Core Team to review and get back with her if it was alright.
- David asked Brantly about Fixed Assets. Brantly replied that they are putting it in Production this week, run some tests, and put it into Production Friday. David stated that Insurance Reporting can be done toward the end of the month.
- Linda Miller had information regarding the telephone system. Telecommunications personnel can come to the office and consult with office staff to design a system to meet their needs.