

ERP CORE IMPLEMENTATION TEAM

Date: Sep 5, 2008

Location: Sparks Hall 3rd Floor Conference Room

Submitted by: Jackie Dudley

Members Present:

Jackie Dudley

Linda Myhill

Tracy Roberts

Linda Miller

Brantly Travis

Stacy Bell

David Blackburn

Anita Poynor

Members Absent:

Josh Jacobs

Visitor

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Jackie opened the meeting by handing out the agenda.

1. Weekly meeting times

Jackie polled the group to see if they were interest in changing the standard weekly meeting times from Friday afternoon to 8:30 am on Mondays. The majority agreed. The standard time will be changed.

2. Housing Application System Request

Jackie reminded the team that David Wilson had sent a request to her regarding the purchase and installation of a new housing application. This request was forwarded to the Student Team for recommendation. Anita indicated that the Student Team was opposed to this now. The team felt that they did not have the functional and technical resources to handle this until the core banner applications were completed. They also reminded everyone that this was not included as part of the first phase of the erp project. She has talked to Lin Bowden, Sungard consultant and Lin encouraged the group to look closer at the new application option. Her reasoning was that our programmers would have to write extensive interfaces between the legacy housing application and Banner and she was not sure that would be the most efficient use of their time.

David suggested that an RFP could be issued and requires that the vendor write all interfaces with Banner.

Anita and Tracy indicated that the student team felt a new housing application would have to be in production by at least April 2009 for use in Fall 2009.

The group disused working with Lin to determine how much time might be required of the programmers to interface the legacy housing application with Banner. Anita indicated that Lin was not scheduled to do this until early in Nov 2008.

Anita brought up the option of using Banner for housing assignments and assessment for fall 09 academic year. The would require that "buildings" be created in Banner and that additional tables would have to be created in Banner; however, the group felt that Housing would have the same functionality as they currently have and this would option may require less testing time than a new third party app or interfacing with the legacy app.

Anita and Stacy are to review this last option with the Student Team and David Wilson and get additional input from the Student Team. This will be discussed again by the Core Team after this second review has been completed by the Student Team.

3. ODS/Cognos

Linda Miller discussed the many challenges we have regarding the ODS/Cognos implementation. These include, staffing requirements, historical data migration, reporting needs, and training. The group discussed that one reason they felt the ODS would be important to use now is the ability to freeze data for future reporting requirements for audit, CPE and misc reporting.

Jackie indicate that several prebuilt views come with ODS. She will contact Ackerman to get a list of these views and metadata definitions. This may help us determine how well ODS/Cognos will meet our reporting needs right out of the box.

Linda Myhill discussed the reporting writing issues that here area faces with the Development app.

Linda Miller suggested that we have one employee IS trained to be our ODS/Cognos specialist and users begin to take over reporting writing for their areas as they become more familiar with the applications.

4. Workflow training

Jackie reminded the group that Workflow training begins soon. Jackie thought that she had a list of prebuilt workflows that are delivered with the product. She will check on this and get this list to the team. Each functional team is then to define 3 workflows they feel would be beneficial to have and these would be presented to SunGard to determine which of these workflows would be good to build in the actual training sessions.

5. FI Celebration

Jackie told the group that she was working to scheduled a celebration breakfast for the FI go live.

6. ITAC

Linda Miller updated the group on ITAC. She has sent out request to Deans and VPs for membership recommendations.

Student Team Update

Stacy reported that the Admissions app goes live on Sept 15, 2008. Tracy discussed completion of validation tables and said that moved had already been moved into PROD and remaining tables would be moved to PREPROD this week.

Jackie testing plans had been competed and documented. Stacy indicated that no scenario testing had been completed. The Admissions staff had worked individually on testing the functionality of

the system. However, readiness had not been documented. Anita and Tracy indicated that the application go live only included data entry.

Tracy brought up the extract that was need from Banner Admissions for routing administrative reporting. Anita added that this extract could be used to feed Banner admissions data to Hobson's (a one way feed). This extract would be in a raw data form that Tracy would use to produce the necessary reports. Jackie inquired if this reporting was required by any expternal agencies and Stacy indicated that is was only for University reporting, but the data was need by Oct 1, 2008.

Anita indicated that Alison Marshall ws checking with Hobson's to see if other Banner schools have a script for us to use that may help with completing this extract.

Jackie ask Stacy to email Alison Leonard, who formally worked for Hobson's, about helping us find a school that may help with an extract script.

The group discussed that the student tech consultant Nisha Joshi may be able to write the script when she is here the week of Sept 15, if needed.

Scholarship Application

Anita discussed that the online scholarship application will need modified for Banner. She indicated that the Student Team felt this needed added to Banner SSB.

Anita recommended that Dave McKenna modify our current app and feed to Banner from existing access scholarship database.

Brantly indicated that the programmers did not have the resources to get this app on SSB with web tailor right now and the McKenna route might be less time consuming for everyone.

Jackie ask if anyone from the scholarship or financial aid office has talked with any Banner schools about scholarship applications that they might be willing to share with us, so we do not have to start from scratch. Anita was not sure if this had been done, but would ask Lori Mitchum to do this. Jackie stressed that there may not be a need to start from scratch if someone has already done something like what we may need.

GP Sync

Brantly updated the group on the GP sync process.

Luminis

Tracy updated the team on the luminis testing. Functional and finance testing should be completed by the end of next week by campus testers.

Tracy requested that the Security Team develop a privacy statement to be posted on Luminis. Since Jackie is the lead on the Security team right now, Tracy forwarded some samples to Jackie to share with the security team. A deadline for the privacy statement was discussed and the group felt they needed by the time Luminis would move to production for campus use.

Meeting was adjourned.