**ERP CORE TEAM**

**Date: October 4, 2010 @ 8:30 a.m.**

**Location: Curris Center Stables**

**Submitted by: Carla Thomas**

**Members Present:**

**Linda Miller**

 **Brantly Travis Lori Mitchum**

**Tina Collins Anita Poynor**

 **Carla Thomas Linda Myhill**

 **Tom Hoffacker David Blackburn**

 **Josh Jacobs Fred Dietz**

 **Jackie Dudley**

**Members Absent:**

**Bob Pervine**

**Guests:**

**None**

**New Issues**

* **Rolling Procedures Central Into Support Site** – This will be added to the priority list.
* **M # on myGate for Faculty Reference for Students (LGM)** – This will be added to the priority list.
* **Maintenance Window in November/October (BDT)** – Longer than normal window required for testing Banner 8 Backups – Proposing 12 hours rather than six hours on October 16th to allow for a cold back-up. CORE approved.
* **Ticketmaster Alternative Approval (LGM)** – Defer to telephone conversation to be scheduled later this week. LGM will distribute New System Request form from HFA to CORE before next discussion.
* **Creating New EE Record –** Having exempt ee’s only get credentials when they begin employment (see email from Tom below). Tom will be bringing proposal back to group at some future time. His office will meet with technical personnel and bring proposal to CORE. CORE felt no additional players would need to be included after doing a test cycle.
* **Banner Upgrade –** Tests indicate that upgrade will take from Friday night to Tuesday afternoon if ODS is upgraded. Beginning Friday night before Thanksgiving. Some concerns about these two days would mean not doing any business transactions for a full week. CORE in agreement to go down at 6 pm Friday, November 19th to midnight the following Tuesday.
* **People Finder (LGM) –** Changes emerging this week. Same on both www site and RacerNet. Ability to search by major departments.
* **HR/Accounting have plans to implement BDMS prior to Banner I Upgrade?** If so, there are implications for testing. HR and Accounting are no longer planning to implement prior to Banner 8 upgrade.
* **Winter Term Talks Proceeding** – This may have huge impact on major maintenance window(s). Just an FYI.
* **EPAFs Implementation (Tom H)** – See background notes below) – Electronic personnel action forms; per Lori M, February would be good for Fin Aid also; LGM will get training set up for February. BDT recommended we also schedule workflow training at the same time. David Blackburn suggested we look at Banner workflow packages available from SunGard as Info Sys resources for writing workflows is limited. LGM will check SunGard’s availability for training in February. Tom H will continue to check with other universities regarding the integration of People Admin with Banner 8. They will try to do this by the next meeting.
* **FINAID** – **Not putting 8.9 in TEST (BDT)** – Lori will check to see if they need this. BDT will send her the documentation on this.
* **Mainframe Demise Update** – **Verification of Phyllis’ data? (BDT) –** Phyllis has completed pulling information off and is working with Tracy on verifying the data before signing off. Sam has been working on payroll and is ¾ through writing programs. FRS, Purchasing and Accounting will follow. Looking at end of October to finish pulling and verifying data. Mark Belva will need three weeks to shut down mainframe.
* **Kronos Update (BDT)** – The last payroll was the first time use of FM’s updated network; next convert to Banner; cost covered through implementation budget. BDT will get some quotes.
* **STARS Software (Lori)** – Software for scholarships; Fin Aid is interested in purchasing this software; does not work for athletics; interfaces/loads into Banner; 8 hours training for Fin Aid; two hours training for Info Sys; David Blackburn said this may require an RFP. There are options to host off site; not possible to get a server in place to host on-site by November 15th. Lori will have Christian get with Jan Fuqua regarding hosting off-site at least this first year.
* **Labor Distribution Patch (LGM)** – Must go into the HR module; discovered through testing. LGM will distribute spreadsheet of what patches have been installed (Info Systems installs only required patches; not the optional patches).

**Ongoing Issues**

* **Text Messages from Bursar’s Office (Anita) –** Has not gone out yet; working with Info Systems to make sure message is ready; real close to being ready to send out.
* **Security Notification (LGM)** – Sign up procedure is rather clunky; working on this.
* **FIN AID (Lori/BDT)** – Hosting would be our only option at this date.
* **Maintenance Windows (LGM/BDT) –** See earlier discussion.
* **Support Site (LGM)** – Procedures Central looks like a likely place for this as well as for Forms Central.
* **Process for Terminated EE’s (Tom H)**
* **Banner 8 Test Instance / Banner 7 (BDT) –** All old TEST instances are still in Gemini if you need to get to them.
* **BDMS Update (Dave B)** – HR and Accounting holding off until after Banner 8 update.

Meeting adjourned.

**Background Notes:**

**(From Tom H)**

Linda,. . . I have had another request/complaint from a department head about our inability to provide an email address for newly-hired staff before they arrive on campus. As it stands now, emails cannot be created until 2-3 days after the employee has visited with our benefits staff and then Lisa puts the data into Banner. Our department heads are saying, “This ain’t right,” and I agree with them. Maybe we can give email addresses to new employees at the time an M-number is created for a “general person.” Maybe there are some other ways to crack this nut. Any thoughts? Thanks. –Tom

-From Tom H. -----------------------------------------

Linda. . . The idea of implementing an EPAF for a process in HR sounds generally OK to us. We might start with a relatively simple process like hiring adjuncts.

A few thoughts:

* We would prefer to do training/testing/configuration in February. Other months would be OK too, but February is preferred.
* If we have any residual problems from the Banner V8 implementation , we would not participate in implementing EPAFs then.
* We will need 1 or 2 HR-dedicated IS staff for this project. Do you have folks available for this?
* Will training/testing/configuration be done for Adjuncts AND student employment concurrently?
* We don’t know the details about Workflow or how it inter-relates with EPAFs. Does it need to be implemented for EPAFs to function? (Answer: Workflow not necessary; but would be helpful.)
* What is the cost of the consultant? (Answer: Per JKD, a minimum of $70k.) Also, will HR be charged? (Answer: No)
* Will budget staff be involved because of any tie with position control? Answer: Yes
* We are communicating with other HR staff at other institutions regarding People-Admin and the pros and cons of using their process that’s equivalent to Banner’s EPAFs. Per David Blackburn, JKD and LFM, People Admin is a different thing” its apples and oranges.: The integration of People Admin into Banner and budget is the big thing.