ERP CORE IMPLEMENTATION TEAM
Date: December 15, 2008
Location: Sparks Hall 3rd Floor Conference Room
Submitted by: Tina Flener

Members Present:
Jackie Dudley

Brantly Travis	**Josh Jacobs**
Tracy Roberts	**Anita Poynor**
Linda Miller	**David Blackburn**
Stacy Bell	

Members Absent:
Linda Myhill

Visitor:
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BlackBoard Integration update: Linda informed the team that the University had until the 19th to give their decision. Linda stated that we do not have any additional information that strengthens the argument of going forward with integration at this time. Linda said that we do not have the means to achieve the benefit that we are hoping for. Jackie asked if there were any ideas for alternatives. Linda replied that she has not had a lot of time with this but she has seen that a lot of schools that do purchase the integration are still doing the grade transfer through a file upload process. After some discussion it was decided to cancel the integration sessions with SunGard.

Student Team update: Anita reported that the Mock Registration was very successful. Tracy added that the consultant did a really great job getting prep work done; so much so that the half day that was lost due to her delayed flight did not hinder the process. Anita stated they were able to go through the Registration process, the Assessment process, and the End of Term process. Anita informed the team that from the beginning to the end there were only a couple of modifications that needed to be done; which was done successfully. Anita said they had only one feed rule for tuition which has to do with the regional discount that did not work properly and has not been resolved yet.

Anita stated that the Student team's critical main concern is that so much of the IT staff is being put into HR that one more delay in their schedule and Registration and Financial Aid are out the door due to the schedule being so tight. Anita reported that if everything stays on schedule the earliest we are going to be able to do awards is mid-March. After much discussion on IT and the resources available Anita asked the Core team if they had any recommendations for solutions on how to proceed. Jackie replayed that IT is going to have to pool their resources; there are only so many people. Jackie added that they need to look at the schedule and see who can be diverted. Tracy stated that she feels IT is not giving enough feedback. Tracy requested that since they have the timeline for Registration and Financial Aid "Go Live" that IT give a alert or heads up if they are not going to be able to meet one of the timelines. Tracy added that the moment General

Person is entered into the system that IT contact her so she can start verifying the data and going through the test plan. Jackie asked when the General student and General Person loads were expected to be done. Anita replied that General student was supposed to be ready to test by January 13th. Jackie asked if IT thought they could keep the schedule between now and Christmas. Brantly replied that he would need to talk to Michelle and Shawn and get back with Student Team.

Anita stated the Student team also had a backfill request from the Admissions office. Anita said the major change is they will pull in the full time permanent staff that manned the front desk to handle some duties inside the Admissions office. Anita reported they are requesting a temporary full time position through the end of next year; with a review on June 30th to see if it is still needed. Jackie stated that it sounded reasonable and she would send it over to the Steering Committee.

Anita re-visited the week of Mock Registration. Anita stated Ken Whitelaw was here from SunGard writing disbursement rule's for us. Anita reported that one of the recommendations that Ken made, when he spoke to David McKenna and his staff; instead of writing over a 1000 disbursement rules for all the Foundation Scholarships and University Scholarships that we have, he can write a function that uses an Excel worksheet that is stored on the server. Anita said it's not in Banner but Banner reads it to get the disbursement qualifications and goes through a serious of testing to see if the student meets the qualifications. Anita stated Linda and Dave both felt it should be brought to the Core team so you would be aware that we are doing a work-around for the disbursement rules. There was concern from the Core team on maintaining the work-around and the work-around itself since the point of going with this system was to get away from making patches. The Core team could see the value in the work-around being less complicated, but Jackie questioned why the work-around was needed and why so many rules would need to be written for Scholarship disbursement. Anita and Josh explained that the University has allowed gift's with specific stipulations which has made the disbursement extremely complicated and some can not be used at all. Jackie asked for a write-up to take to the Steering Committee.

Anita stated that while Ken was here he recommended additional training for the Financial Aid office due to the high volume of turnover with people retiring. Scott Kramer from SunGard came last week for the Mock Registration and saw Financial Aid was able to go through the processes extremely well. We have requested a training session the 1st week of February. Anita said the only two outstanding issues that need a resolution are Lender ID #'s for Student Loans and the award process for ACG Grant. Anita informed the Core team the Lending ID # is dealing with the general person record and the Lending ID # has to be the Federal ID # which is a six digit number and it is not an M#. Anita said Scott recommended creating General Person records with the Federal ID#. Anita stated she e-mailed Western and Eastern and they are both using the Federal ID#. After some discussion it was decided that some more research would need to be done on if a duplicate vendor would need to be made or if it could be done through a alternate ID#. Anita went to the second issue of the module is not being populated so ACG's cannot be awarded. Anita said the alternative to that is the Financial Aid office will need to be given copies of the High School transcript to manually evaluate each student or it will need to be done by the Admissions office. Stacy added it would take a full time person going in and

manually typing it into Banner. Tracy stated she has not spoken to Austin Peay or Western but she has a hard time believing that they are entering this information manually. After much discussion Jackie asked when this would need to be resolved by. Anita responded that they would need it by Mid January. After more discussion it was decided that they would need to get some more technical information and consult some other schools and the team would meet on this again.

Finance update: David asked about the fixed asset conversion. Brantly said they had not had time to look at it but the goal is to load it into a test. David questioned if we will be able to convert before the end of this semester. Brantly stated that they could load it into test. A decision is yet to be made to load into banner or keep using FRS.

HR update:
Jackie stated that there were 1500 people Friday that had not started a time card; but there were 600 approved already. Jackie felt that the 1500 number was off due to student's not working and temps that are not in the system; the number is closer to 500-700. Jackie reported that there have been no problems with payroll itself; the system is working the way it was designed to work. Jackie said the sign on and approver proxy parts are the only problems reported, which was anticipated.

Luminis update: Linda stated she had nothing new; they have been pleasantly surprised by things working as anticipated. Linda said a concern has been not being able to login. Linda asked what the earliest date that students will need to login to get their scholarship information was. Anita replied February; the awards will be occurring between January 15th and February 1st. Linda asked when the loads will actually occur. Anita said they will start loading January 15th and continue from there.

Tracy stated that they noticed about 50% of the full time employees in Luminis did not have an INB channel. Tracy said she spoke to Sherry and gave her the list of who did not have it. Tracy informed the Core team that she was not concerned because they had another way of getting into INB but sometime Thursday or Friday the link was taken off the site and no one knew that would happen. Brantly suggested that the issue is probably occurring because they do not have a GOBIAC record; without that they do not have access to INB. Tracy said Sherry sent her the link and she has had the people without access bookmark it as a favorite link for now till a solution is found.

Communications update: Josh stated there was nothing to report.

Network, Service, & DB Support update: Brantly reported that they had talked about extending Elaine Morris; having her on retainer for a year. Brantly asked if that was something the Core team was okay with doing. Jackie stated she would need to send it to SunGard to get a quote.

Brantly stated that they are concerned about cloning test because things are configured differently in test. Brantly said in order to clone we have to clone everything to production;

could be a three to four week process. Brantly estimates it will take most of January to figure out how to clone test into production. Brantly said another big issue is making sure Darwin is complete before going into production.

Brantly informed the Core team that Gina checked and we are paid through June of '09 on the Con Data contract so there is time to cancel.

Other topics of discussion: Tracy asked the procedure for finding duplicate Person. Brantly responded that they should contact Michelle in IT.