**ERP CORE IMPLEMENTATION TEAM**

**Date: August 10, 2009 @ 10:30 a.m.**

**Location: Sparks Hall, 3rd Floor Conference Room**

**Submitted by: Carla Thomas**

**Members Present:**

**Linda Miller**

 **Brantly Travis Tracy Roberts**

 **Stacey Bell David Blackburn**

 **Anita Poynor Jackie Dudley**

 **Tom Hoffacker Carla Thomas**

**Members Absent:**

**Linda Myhill**

**Josh Jacobs**

**Visitors:**

**Clay Stabler, SunGard Account Manager**

**David Habig, SunGard Account Executive**

**Meet With SunGard Account Team:** David Habig introduced himself to the Core Team**.** Working mostly in the Cincinnati and Louisville areas, he explainedthat his job is to handle all new clients and their satisfaction with SunGard. MSU is now entering Phase II Implementation, at which time some areas become at risk. It is important that he and Clay continue to be in contact with MSU and ensure that we are getting the most out of the Banner system’s capabilities and are managing its maximum values. That is the plan he and Clay need to work out with this group – identify the clean-up areas, identify which specific objectives we hope to accomplish in the next six to twelve months. Now is the time to revisit the functionality and take advantage of additional/new functionalities of the system. His key point – things don’t stop now. We continue to plan and maximize the functionalities of Banner for MSU to get the most out of it. David suggests the possibility of a planning session on an annual basis to include technology planning, solution planning, etc. Or, another option, would be to have Clay or David Ackerman at a meeting like this Core Team on a quarterly basis to get input on how things are going, what problems we are having, etc. He wants to leave here with an understanding of what we expect from him over the next three to six months. Also, it is his job to make sure that we are communicating with other Kentucky universities using Banner when and where it is appropriate. He wants to establish a predictable partnership module between MSU and SunGard.

 Clay Stabler spends a great deal of his time working in the Nashville area. He is the guy that gets the call when there is an emergency. Clay encouraged the Core Team to send representatives to both the SunGard National Summit Conference in San Francisco next April and the regional conference at MTSU in mid-October. Both of these conferences are great ways to continue training and stay on top of new functionalities, etc. Clay shared that there would be some announcements coming regarding enrollment management and retention management, etc.

**COESIS Update:** Brantly updated the group on the College of Education Student Information Systems (COESIS). COESIS went live Thursday, and they are transferring data exclusively from Banner now. A request was received today to receive first, middle, last name in all upper case. They still need to automate and should have all feeds automated by the end of the week. Tracy Roberts said there may be a need for some tweaking as the fall semester begins. All Kentucky schools are required to submit this same information in the same format to the state. Eastern has integrated the system with Banner. What we have done we feel is a short-term solution. However, the group was reminded that here short-term solutions often become long-term solutions. Linda Miller voiced her concern that this is one of those at-risk areas to which David Habig had referred. David said he would talk with Eastern.

**Phone Book Update:** We are moving from paper to online phone books. Brantly shared that pulling the information down has been more difficult than expected. He plans to load tomorrow; needs to populate home orgs. Jackie and HR need to know when he does this. It is hard to say what time frame. . . Brantly will need to work with Dave McKenna to see when it can happen.

**Don Robertson’s Hobson’s Needs:** Linda reported that Dr. Robertson needs to have Hobson’s done within the next month and finding the resources to do this is going to be very tricky. Brantly spoke with Phyllis Banner earlier today and she said she can start looking at this. Per Tracy, the Judicial Action Committee (Mike Young) said they are willing to do this manually for a while. David Habig shared that SunGard has an enrollment management piece for Banner which uses ODS, Luminis, etc. that result in great cost savings over Hobson’s. They have tons of customers out there using Hobson’s. . .he did admit, however, that feature to feature and from a cost perspective Hobson’s is kicking SunGard’s behind. SunGard was late in the game with enrollment management.

**TouchNet Update:** Anita reported that ebills were sent out last week, with 290 kicked back due to full email boxes. For those 290 individuals, the Bursar’s Office is printing a copy of their bill and putting it with a cover letter to mail to the students. They hope to have those out by the end of this week. Anita will send a draft of the letter to the Core team. They have identified approximately 20 students who cannot log into TouchNet. They have a request in to TouchNet and Sherry Lamb is also looking into the problem. Those 20 students have been emailed a PDF attached statement. As of this morning, approximately 5800 of 8100 students enrolled have not logged in to view their bill. It was agreed that on the old Student PIN system the ability to update addresses and verify enrollment would be disabled after Wednesday night. After that, students will be redirected. Financial aid and scholarships were disbursed yesterday. They spent most of Saturday trying to work out issues regarding loans; disbursement script reads under-graduate but is not moving to graduate. Linda Scott is correcting the script today so that graduate and post bac loans can be distributed. Anita must do disbursements tonight. Payment plans are working, cash is coming in, and 992 rebate checks were authorized. The first purge will be August 21st at the earliest. Tracy said that student’s residential college address/local address needs to be loaded before this weekend. Michele is splitting the script so it loads the mailing address and not their room number.

**Duplicate PIDMS:** Tracy relayed that the document has been signed by Tom Denton and is at George Washington University. She is receiving calls daily and it is getting to crisis point for some cases. Brantly suggested scheduling another meeting this week to identify which ones can be corrected. Anita asked if any of the TouchNet problems could be related to the duplicate PIDMs. The questions how do we resolve duplicate PIDMS, and how do we avoid duplicates being created were also raised. Tracy and Stacy are to plan a training session during the second or third week of September for those individuals creating PIDMs. David Blackburn suggested that the session begin with a pep talk/scare tactic from Linda or Jackie or Anita regarding what happens if you continue to create duplicates.

**Library:** Brantly shared that Sherry Lamb is working with Aleeah McGinnis on this issue. She has sent a test file that is being tweaked. They have come up with a plan for deleting students at the end of the term.

**NetCard Manager:** A request to acquire a product that seems to not contain all of the parts we need (i.e. declining balance) has been submitted by Richard Fritz. This system is not currently linked to TouchNet. The Core Team was in agreement that this is not something that can be done this close to the beginning of the fall semester and, therefore, is a low priority. Also, NetCard Manager is a new product and, if purchased, there are concerns regarding how many bugs to be worked out. Linda will let him know it needs to be moved to a later date.

**iOffice:** Brantly reported that Tracy and Stacey say he does not need IDOMs. It’s really ugly code to pull it together, but it is doable.

**Distribution of New Student Email Credentials:** Linda updated the Core Team and shared that we are now sending students one letter only which contains all that a student needs to get into the Luminis system.

**Blackboard SSO:** Linda reported that when the data feed to automate single sign on was done there was a BlackBoard issue. The link for BlackBoard is being moved to Luminis and is being removed from other public sites. SSO has been delayed until after the semester begins.

**Cognos Reports:** There is a need to dispel the myth across campus that reports will be magically generated for everyone. The possibility of receiving training on report writing from someone unfamiliar with Banner was discussed. It is felt that we would benefit from a Cognos users group. Linda shared that the President is interested in having some type of demonstration for upper-level administration of Cognos.

**Guest Access Process:** Tom H. reported that visiting scholars is the big group that needs this. There are three types of visiting scholars: 1) Employee, 2) Non-Paid individual that interacts with faculty and uses the Library, and 3) Stipend Employee. They have determined how to handle types one and two. They are still working on the third. He is optimistic that they are closing in on having a complete process for these three types. Visiting Scholars will be here next Wednesday.

**Voting:** Discussion was delayed until next week.

**Report on Maintenance Downtime Weekend:** Linda commented that it did not work well to try to cram 12-24 hours of upgrades into one window. We need to be thinking on a better and more frequent way. Discussion is to continue at a later date.

**Review Upcoming Open Issues:**

* Linda needs to get with David Blackburn to schedule Xtender training.
* Anita still needs to add her tasks to the document.
* Document needs to be updated by all team members. Jackie will add what had been added as of the last meeting and then Anita will update and Linda will add information from today’s meeting.
* Salary Planner meeting is scheduled for next week. Additional scripts are needed in order to get that into place, per Brantly.
* Brantly reported that Active Directory was added to MyGate as of last Friday.
* Jackie would like to schedule an annual or semesterly overview with SunGard representatives to see what is coming down the hatch.
* David Habig thought he or Clay should be at the Core Implementation Team meeting on a quarterly basis minimum (for free). He will talk with Linda regarding this schedule.

Meeting adjourned at 12:55 p.m.