**ERP CORE IMPLEMENTATION TEAM**

**Date: August 17, 2009 @ 8:30 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**

 **Linda Myhill**

**Members Absent:**

**Josh Jacobs**

**Visitors:**

**None**

**Great Beginnings:** The meeting opened with a discussion of how things went this past Saturday. Anita reported that she had one person that experienced problems getting on MyGate. Stacey and Tracy only had a couple of people with questions. However, they felt there might have been more if they had been on the schedule. Linda shared that the Help Desk took approximately 160 calls but at no time had all incoming lines been lit up.

 There was some discussion regarding difficulties in extracting seemingly easy, straight-forward information from Banner (i.e. a list of freshman students).

**Student PIN System:** It was consensus of the team that most of the functionalities of Student PIN are no longer useful. The question “Do we know all of the uses of PIN that are not imbedded in Banner?” was raised and discussion followed. Tracy has tested address change in Test and is ready to move to Prod. It was noted that when we switch on students in Prod it will include those MSU employees that are also students. If Human Resources approves, Tracy will go live with update addresses, emails, marital status, ethnicity – all those items listed under properties. The Core team is in agreement that we leave PIN accessible for now but disable the change address ability.

 It was decided that to request an official transcript a student must go through MyGate. Anita said there is an SSB function to have a link to allow people who don’t have MyGate access to request a transcript (just like the admissions application). She said this should be available prior to the bulk of requests in October. Tracy shared that there is a problem of future admissions having MyGate but not having the Academic tab. This must be fixed as soon as possible.

 It was determined that access to view class schedules, view contact information, view account balance, view personal information, request enrollment verification, view holds information and request meal plan change would be removed from Student PIN. Access to view grade reports and view 1098T tax information would remain. Tracy will look into Advisor PIN to determine what will stay, if anything. Changes to Student PIN will be done today by Sherry Lamb, as long as we can get address change going. Tom H./Teri Ray will contact Tracy and Tracy will contact IS (Linda and Brantly) when we are ready.

**Training New Faculty/Staff:** Tracy shared that the questions “What is MyGate?” and “Who will train me on this?” came up from almost every person in new faculty training. Do we want to have standing, on-going training sessions for new faculty/new staff? Or can we develop a camtasia-type video? The team determined that training must fall back on departments for now and Tracy’s office would work with CTLT to develop training videos for future use. The on-line training tools in Banner are good, but they are so buried you can’t find them. It was felt that we need to put training tools on the MyGate site. Tracy will talk to the Provost’s Office regarding encouraging departments to give new faculty training. Linda placed this on her open issues list. The possibility of developing some tailored FAQ sessions involving Human Resources, Finance, and Advisor groups was discussed. There is a willingness to do this sort of training and clearly a need for such. It was determined that the discussion of training would be continued outside this meeting.

**Xtender Training Schedule:** According to David Ackerman the first time available for training is in December. Due to the delay, we need an official communication from procurement to Brenda Nix (in particular) that we would be doing training in December with possible January implementation. Stacey Bell stated that Allison Marshall has had communication with the President’s Office that they will begin scanning and shredding documents this semester. David Blackburn reported that if purchasing scanning equipment now, individuals need to purchase something that supports ISIS or TWAIN. He recommends spending your money on a good scanner and says that everyone suggests we stay away from the multifunction machines. You should purchase a scanner with a good, reliable auto doc feed feature. Xtender will go live for all of campus at once.

We need to determine, as a group, our implementation date for Banner 8. There is probably a new version of Xtender for Banner 8. One concern is that we need to confirm the servers purchased back in 2008 still meet current specifications.

**Delaying the Clone from Prod to Test:** An FYI from Brantly – If we delay the clone from Prod to Test for one week so that Test can be used for training next week, then that gives us one less week to test.

**Email As An Official Means of Communication:** The proposal that a student’s MSU email address be used as the official means of communication between university and student has not gone before the Board of Regents. Banner gives the capability for students to select a preferred email address. There was discussion as to whether we should allow students to pick their email address rather than using MSU email addresses for official communications. Should we provide a link and instructions to forward MSU email to another email address? Linda would like us to think on/research this issue before our meeting next week. There was some consensus that the MSU email address should be used as our official means of communication with students. Tracy will check to see if there is a way to remove the preferred email check mark from Banner.

**Security Team Revisit Membership:** This team is charged with the task of determining who should have certain accesses. Jackie reported that we need to update team members. It was determined that current team members should include Jackie Dudley, Scott Lapinski, Brantly Travis, Tracy Roberts, and Sam Rice. Jackie will notify Scott.

**Don Robertson’s Hobson’s Needs:** Brantly reported that Phyllis Baurer didn’t think it would be too difficult to get out in the next couple of days and then Andy Hill will test.

**TouchNet:** Anita shared that Sherry Lamb has increased the time out period but this still has not addressed those previously having issues. Anita logged in at home on the Money page; when it timed out she selected “Log Out” and was able to log back in. She believes individual problems have to do with authenticatin, not with timing out. Brantly said we can redirect them to a link directly to TouchNet with a password good for five or ten days. TouchNet does not think it’s a TouchNet problem, they think it is a problem on our end. Brantly doesn’t see how it could be a Luminis issue. It will require additional information from those having issues in order to determine if the problem in on our end. Anita’s office has been able to find no common link between those individuals unable to log in (i.e. not all new admissions, etc.). Brantly will work with Anita and Sherry Lamb to try the direct link to TouchNet and see if that works. It was felt that we should contact those people on Anita’s list to see if they are still experiencing problems. The Bursar’s office will try to contact these people after we try the password change in PIN (TouchNet).

**Duplicate PIDMs:** Tracy reported that they met last week and have started the process of working with cleaning up and will then work with IS to delete incorrect PIDMs. Gena Wilson has looked at duplicate vendor PICMs. Some have AR marked which could truly be AR or could have \_\_\_\_\_\_\_\_\_???\_\_\_\_\_\_\_\_. Brantly was going to look to see if they are vendor or student.

Tracy’s office has identified 75+ duplicates and the number is still growing. She will be doing a re-training of approximately 20 in mid-September at the Gatehouse and would like to include IS, Scott Lapinski, etc. to reiterate the importance. Amy Waters and Sarah Delaney should be included for vendor information and Lisa Mathis and/or Teri Ray from Human Resources. ESL should also have a representative present.

**Library:** Brantly shared that this is almost complete. The last thing is the selection of students. The file itself is basically ready to go, we just need to make sure we are pulling all of the people that need to be included.

**iOffice:** Brantly report that iOffice is basically complete as well. He sent a file to IU on Friday to load and verify. Once we receive confirmation from IU we will be ready to go.

**Report to Extended Campuses of Online Students:**

 Linda – did we discuss this? I have nothing in my notes about it. (CLT)

**Review Upcoming Open Issues:** Linda asked what are the burning issues that are not on the Open Issues list that must happen within the next month?

* Jackie said that Budget Training must take place.
* The file for electronic deposits for travel must be loaded. This is currently on the Open Issues list but must be done within the next week or so. If we are going to include student employees we need to communicate that to them. Otherwise, currently it will include only employees with direct deposit. Jackie will see if we can get a cript for students.
* Tracy asked if Residential College addresses have been loaded as a type. Brantly asked if we can load everything and then SQL out the room number. Tracy needs this loaded as soon as possible. Brantly’s and Anita’s understanding is that they can only run this once a semester and there are many changes with the first two to three weeks. If Brantly runs it this week, Housing would have to update from then on and they do not currently have address update access. Brantly will look into the process. Public Safety will need access to Housing information for individual room numbers.
* Custom channel to display Housing assignments – need to revise date on Open Issues list.
* Clone test will be Tuesday/Wednesday of next week (August 25th & 26th) per Brantly.

**Open Discussion:**

* GTVSDAX – Tracy used to have access. Access should be limited to the Core Team members and be updated periodically by Tracy. Jason Royalty may need access as well. Sam Rice is working on getting accesses back for Tracy.
* Electronic Transcript – Tracy has some stuff from Shawn and some information from Dave. She has not had time to look at it. She needs to be able to print transcripts by mid-semester; must order paper by September 1st.

Meeting adjourned at 10:55 a.m.