

ERP CORE IMPLEMENTATION TEAM

Date: January 12, 2009

Location: Sparks Hall 3rd Floor Conference Room

Submitted by: Tina Flener

Members Present:

Jackie Dudley

David Blackburn

Stacy Bell

Tracy Roberts

Brantly Travis

Linda Miller

Anita Poynor

Members Absent:

Linda Myhill

Josh Jacobs

Visitor:

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XTender imaging update/discussion: Jackie started the discussion on how we should move forward on XTender. Jackie stated that March 23rd training is the on site needs analysis; followed by user training in June. David informed the team that XTender is very technical and when in place is run by Info systems. David suggested that the amount of support that will be needed may be greater. David also stated that an administrative structure would need to be outlined to decide how to move forward with training. Jackie asked the Core Team if the areas knew what they want to image. Stacy replied that Admissions is wants everything imaged. Anita said that Financial Aid wants to start out with everything that is needed for the verification process for awarding Financial Aid; while the Bursars office would need 3rd party contracts, which is shared with the Financial Aid office.

Jackie informed the team that the installation is scheduled for June. David had concerns with the installation being a week before training. Jackie asked the Core Team if a group should be brought together to decided what we want to do; or if they should wait until they have an agenda from the onsite needs analysis. After some discussion it was decided that Jackie will get the agenda and the team will come back to this to discuss in the future.

Cognos power users update: Jackie stated that she had e-mailed some of the Core Team about Cognos training this week. Jackie informed the team that Mark Ballard has suggested that it is not important for functional users to be there; it's a technical session. Jackie reported that the functional users will start getting involved the 1st of February so we need to determine who the functional users will be and the "Power users" will need to be notified. Anita suggested that Tracy would be the Power user for the Registrars and Admissions office. Tracy confirmed that she has been but that Lisa in Admissions has used Cognos so she should be involved as well. Anita stated that Financial Aid would be Scott Lipinski, and she would like to be the Power user for the financial side of Student Systems. Anita questioned who would be the user for Academics. David also suggested that Institutional Research would have to have a Power user. David brought up the concern of limited number of users that are available. Jackie suggested

that the list of names be compiled and then it can be edited to fit the number of user seats available. Tracy stated that if there was room that she would like to add Megan Short's name. Jackie said that from Accounting and Finance she would have the managers involved; HR will have Teri and Lisa. Jackie stated that she will finish developing the Power user list, and find out the reporting needs.

Touchnet update: Jackie asked for an update. Anita stated that they have the schedule; preliminary work will be in February and actual training will start in March. Starting out the schedule is to have the non A/R portion of Touchnet cashiering up and running in Mid-April. Jackie asked if there was any wiring that we need in the Cashier's office. Anita replied that there is a network drop at each window and each of the desk units.

Workflow Production update: Jackie stated that the Workflow process for the clearance form was completed during training, though she doesn't know how much testing was done. Jackie informed the team that the other Workflow that was done was a .org creation which is inside of Banner. Both of these Workflow processes are ready to move into production pending more tests. Anita asked Tracy when we clone production into test. Tracy replied that it is between February 2nd and 5th. Anita asked the Core Team if we have spoken any more about purchasing the design workflow processes. Jackie stated she did not get feedback from anyone on the web conference. Anita stated there are some student workflow's that would be beneficial. Jackie asked if we are ready to implement them. Anita responded with a no. It was decided that we should wait at this time if it can not be implemented.

BlackBoard SSO update: Linda reported that it was going pretty well; there was some uncertainty on if SunGard would be doing the install in production as well as the test. Linda stated that during the call last week, they stated it would be two hours; we are making sure it is functional in test and when we agree it is done we will go ahead and put it into production. Linda informed the team that there are a couple of different ways to get to BlackBoard from Luminis; it's not perfect, the 1st time a user logs into Luminis and goes to BlackBoard you have to input your credentials. Linda said the message that tells you to login to BlackBoard is poor, but it does seem to be functioning and we do seem to be close.

Summit update: Jackie asked the Core Team if there was any interest in going to this year's Summit. Anita reported that the Financial Aid office will be covering the cost for Scott to go. Linda said that IT had at least three that would go; Brantly, Mark Belva, and Mark Ballard; but that was cut due to budget situations. Tracy stated that Admissions will be going live during the Summit in mid April so no one from there would be going. Jackie let Linda know that she would talk to Tom to see if anything could be done for IT.

Sparks Kiosk update: Jackie stated that she spoke to Kim Oatman last week regarding the Kiosk. There was much discussion on the placement of the Kiosk(s) in Sparks. The team agreed that the most promising areas are the gravel/plant area on the first floor and the lobby area of HR on the fourth floor. Jackie expressed concerns over security of the terminals and having people to manage them. It was decided to discuss this further with Kim.

Network, Service, & DB update: Brantly and the Core Team discussed in length the procedure of how student workers will be logged into SSB/INB thru Luminis. Anita, Stacy, and Tracy voiced concern on student workers being able to know their login and password of Luminis, giving them the ability to access Luminis from a home PC and altering student information. Brantly was concerned with departments having student workers doing work under the manager's login. Brantly suggested creating a Generic General Person login using First name; "Student", Middle name "Function", and Last name "Department". The student will be assigned a login, the password would still be entered by the supervisor but this would give accountability to who has entered what into Luminis. Tracy was concerned with students having to share PC terminals due to workers not logging off and having a new person log on. After much discussion the Core Team agreed that the General Person Generic login would be the best solution.

Brantly also informed the Core Team that fixed assets will be loaded into file tonight.

Luminis update: Linda stated that all she had to report were there were some small issues with the test this morning. Tracy mentioned that there were users that still don't have the INB link on their Luminis channel.

Student team update: Tracy informed the Core Team that she needed to have a long conversation with Michelle this afternoon on updates. They are having bi-weekly IT calls and a call with Lynn this Friday. Tracy stated that Mach 2 is scheduled the last week of February. Brantly added that he wanted people to keep in mind that when there are glitches it will cause them to miss some of the small deadlines but making the big deadline is the main thing to focus on. Tracy agreed and stated that the 1st week of February is the critical deadline because the 2nd week of February is mock Registration.

Anita reported that they have loaded detailed codes for students loaded into Pre-Prod; which is needed for Financial Aid. Anita stated the new release for 2009 came out last Friday and IT does have it. Anita said Scott and Lori are reviewing the updates to insure they understand the changes. Linda asked what the time frame of completion is. Anita replied that the Student team Financial Aid side will be completed this week. Brantly stated that the schedule for IT is to put it into test by Saturday. Anita informed the Core Team that she and Jennifer had a meeting discussing the consent indicators. Anita stated that they have a preliminary question ready to go and that they want a couple of people to review it before it is released.

Anita asked Stacy if they have identified their Backfill positions. Stacy will send Jackie a copy of the P.A.

Jackie stated that the departments are going to need to narrow down the locations and times for the "Campus Go Live" event.

HR update: Jackie said that they had decided last week on new employee distribution sign-on which is in the works. David asked that something be brought up in the Data Standards Committee regarding address changes. David questioned if one form would be made for all address changes, vendor and student alike; or have address change available online. Jackie stated that HR doesn't want addresses to be changed online yet. Brantly concurred that right

now it is not allowed online; Tracy added it will not be ready for that until fall. The Core Team agreed that their needed to be a common form until online changes can be made in the fall. Jackie stated that there is a Data Standards meeting this week and it will need to be addressed.

Other topics of discussion: Linda asked Jackie if she could update the Core Team on Phyllis Bauer. Jackie stated that the President and the State has approved her to work; now they are finding a place for her to work. The Steering Committee has charged Jackie with finding a location. Jackie reported that she has gotten some partitions from surplus and she will be working on Student Team. Jackie stated she will be working primarily on coding type issues; and that will start around the 26th. Anita asked where she will physically be placed. Jackie responded that the Machine room is a possibility. Tracy said that she has an available area that is closed off and has a computer and printer already set-up.