

ERP CORE IMPLEMENTATION TEAM

Date: October 6, 2008

Location: Sparks Hall 3rd Floor Conference Room

Submitted by: Tina Flener

Members Present:

Jackie Dudley

David Blackburn

Brantly Travis

Stacy Bell

Josh Jacobs

Tracy Roberts

Anita Poynor

Linda Miller

Linda Myhill

Members Absent:

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Visitor

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1. Disaster Recovery

Jackie discussed disaster recovery and how this is something that we do not want to fall through the cracks. Linda Miller reported that some IT had been meeting to look at how we change over and what we need to do from a system standpoint. They have been meeting for about six weeks. Their goal is to migrate the processes and procedures that we currently have for maintaining disaster recovery capability on the mainframe. Jackie inquired if the IT group was going to look at vendors and Brantly reminded everyone we use now is SunGard. Jackie asked if an RFP would need to be done if we use SunGard or would we be able to keep our same contract. David indicated that there has been a shift in our current contract and he felt disaster recovery offerings were probably in a different division of SunGard.

Linda indicated that IT has been talking to Morehead for 9 months about setting up a hot site. Jackie inquired if any of the functional areas had any discussion on disaster recovery. Accounting and some in the Finance Team had discussed this in a general sense, but she did not think HR has talked about yet.

Linda stated that Dave McKenna is the coordinator of the IT group and Brantly suggested that he could meet with David and get an update on what they have done. Linda indicated that there were decisions that were made early on to not have redundant back-up of the system because it causes incredibly more overhead. It was decided to go by system how much down time the campus can tolerate. Jackie suggested that the IT group possible meet with the Core Team at a regular meeting and see how the functional and technical folks could work together.

2. SunGard Coordinator for ODS/EDW/Cognos

Jackie reported that Steve Waldman is going to be our project manager for ODS/EDW/Cognos. We will have different trainers but he will act as a consultant to oversee the whole implementation of all three of those products. They are to get me bullet points of his responsibilities so we can clarify what those are. These areas are fragmented but related; one can't work without the other. Jackie will e-mail the details to everyone when they are received from SunGard.

3. Web location for Admissions Web Applications

Jackie inquired if the web locations had all been decided and the student team had what they needed on this issue. Tracy reported everything was in order and moving forward.

4. Workflow

5. The group had a brief discussion on Workflow and most felt the last training was very helpful, but more technical than expected. Tracy brought up the fact that we will have experts in some areas and they will take the lead for their areas and IT may have to help those areas that are weak in technical resources. Jackie reminded the group to think of any other workflows each functional area would want to prepare during trainings. She indicated that Accounting would like to have the approval Q setups done through workflow, but that was the only workflow process from the Finance Team. The HR team would not have any to do at the initial training; therefore, the remaining time could be spent on Student and Financial Aid needs. **Team Updates**

- Student-Anita and Stacy –

Stacy reported that the Admissions Team had been in hibernation mode last week and accomplished a great deal. The Hobson's extract is done so that Hobson's can see who's applied and who's admitted. It's tested it just hasn't been handed over to Hobson's yet.

Tracy indicated that they have sent a test file to their Hobson's consultant, but have not heard back yet if there are any additional things needed. We aren't expecting anything to come back, they gave us a list and we gave them even more.

Stacy reported that Admissions was still putting Apps into production last week and they were working fine. The communication plan had to be changed, but that was completed last week also.

Anita discussed the scholarship extract for the tier scholarships. They have the contact codes set up in the Admission file and have the extract process for the letters; they just have to complete the mail merge process. The Student Team is meeting to finalize the scholarship application. During the student conversion last week, Shawn McCann, the SunGard Technical consultant was very familiar with WebTailor and the overall process; he did a demo for Brantly, Jackie, Lori, and Anita on how SunGard can go about doing the Scholarship application for us. This would be a combination of using a small piece of Web Tailor and SQL and HTML. Shawn was willing to do the overall project for the University if the University chose him to do it. He estimated about 40 hours.

Jackie and Brantly discussed that we just do not have the skill at the University to complete this by the Nov 1st time frame and with the language Shawn is recommending.

Anita reported that Western is handling their scholarship apps manually. Shawn indicated that we can store the responses directly into Banner if we build the application as he has suggested. That would be a big savings of time for the Financial Aid office. We can do the resume part for incoming students and we can store those in Banner in a table. For current students; if Student Life agrees to maintain the activity for current students then we will be able to have current student activities collected. Anita indicated that her and Lori are working with Dr. Robertson's area to see if he will agree for Student Life to collect that information. We learned quite a bit and made some good headway with it.

Jackie reminded the group that we need to get the estimated hours for completion from SunGard. 40 hours is a costly venture but we don't have the skills and it's a lot to be gained. However, the specific needs and layout should be documented for SunGard.

Anita stressed that the awarding of scholarships begins in January 2009. If the online app is ready by November 1st then that gives them time to complete the process. Jackie felt it might be risky to count on SunGard to have this completed and tested by November 1st and asked what our contingency plan was. She inquired if the current online app was an option. Anita indicated that the old system would need to be updated with the new scholarships and that Dave's group will need to do that. Jackie suggested that we get the draft to SunGard and see if they can turn around an estimate quickly.

Anita reported that, with the Financial Aid 7.12 upgrade, we now can gather consents. The Financial Aid module will allow us to go into terms and conditions and you can make your consent part of that and Banner stores that information. If a student does not consent to it, it will not let you in to view your information so that stopped our problem. The student team will have to learn 7.12 and there are a lot of changes. The guide is about 250 pages.

Brantly reported that 7.2 is currently installed.

-Luminis-Tracy-

Linda reported that once we are done with testing in Luminis we are going to have to get Prod loaded. That is causing anxiety because we didn't do the load; Carlos did that, it's been a long time since we've had any training on it, and the deficiencies in the system they provided us. She suggested that we seek SunGard's assistance in getting Prod loaded. Linda felt we would be ready for the PROD within 2-3 weeks, maybe not even that long since the things we are uncovering right now are generic issues. Problems have not been encountered with Luminis testing.

Linda mentioned that they have not heard back from Blackboard since the last conf call in June. They were going to get back to us two weeks from June 13th. There are some big open points pending.

Jackie said she would follow up with David A. on the Blackboard questions.

Tracy reported that the Luminis testing is slow, but the group is moving forward. Luminis seemed to be working, the problems were more user related.

The group discussed the Luminis signon process and Brantly indicated that it was decided to use the social as the password but a lot of issues surfaced with that option. It was then decided employee's would use their current e-mail password and students to use the security PIN number that is on pin now; that will go away when PIN goes away.

-HR-Jackie and David-

David reported that the HR team will begin Parallel Payroll testing on Tuesday.

Jackie explained to the group that December 8th is the target date for campus HR training. This training will be conducted in the TEST instance and will include time card completion and approvals.

Tracy reminded Jackie and David that the Luminis people need to meet with HR on what specific channels they will need at their go live date.

Jackie indicated that Sara Goodman is pulling modifying self service now. HR is trying to minimize the rollout and changes presented to the campus on Jan 1.

The group discussed student address changes and confirmed that these would all be made, in Banner, by the Registrar's Office, effective immediately thru July 2009.

Brantly explained that we are going to update through GP Sync through September 1. The priority is going to be for students:

1. Condata student address
2. Student System
3. BRS for refund, billing, and parent which is the highest priority

All changes will be in the Legacy systems and GP Sync will pick up changes and load them into production.

It was discussed how new students will on Luminis if we are using the PIN security number as their password. Brantly will discuss this more with the Luminis IT folks and see what our plan is after PIN goes away.

Tracy reported that new students will have access to Luminis when they are admitted. They should get a communication from Admission telling them how to log into Luminis.

-Network, Service, and DB Support-Brantly-

Brantly reported that we will need to purchase a Cognos Test server. IT has spoke with Steve Waldman at SunGard/Cognos, we were hoping to use a virtual machine; however, this is not supported. The quote came in around \$7000+. We hope to have them install in production and have them come onsite so our guys can watch them and get all the information they need so they can do it after. The only additional expense will be travel and lodging. It's not something they like us to do because we are over their shoulder asking them questions and slowing them down but it's beneficial to us since we are going to have to be the first line of support.

6. Other