**ERP CORE IMPLEMENTATION TEAM**

**Date: September 21, 2009 @ 8:30 a.m.**

**Location: Curris Center Stables**

**Submitted by: Carla Thomas**

**Members Present:**

**Linda Miller**

 **Brantly Travis Tracy Roberts**

**Jim McCoy Josh Jacobs**

 **Anita Poynor Jackie Dudley**

 **Tom Hoffacker Carla Thomas**

**Linda Myhill David Blackburn**

**Members Absent:**

**Stacey Bell**

**Guests:**

**None**

**Student Phone Numbers:** Discussion was deferred until we can determine all of our options and ranges. Linda Miller will develop a listing of options and send to Core team for input..

**Second Major Issue:** Tracy Roberts reported that we must work the timing out to switch the approximately 230 people over. This shouldn’t take more than an hour or two to switch these people and push to PROD. Tracy must coordinate with Linda Scott. Phyllis Baurer has been working on the COESIS side. Tracy would like to move these students over early tomorrow morning.

**Blast Emails:** Linda Miller shared that it is her understanding that Core’s stance was to move everyone to Banner as the official means of communication through Luminis targeted announcements. Core team was in agreement that we continue to steer away from blast emails toward targeted announcements in Banner for All Faculty, All Employees, All Students groups. Josh Jacobs agreed to be the appeals process for sending blast emails. Of course, Tom Denton and Public Safety will always maintain capability to send blast emails for emergency notifications. Josh will talk with Tony and Beth regarding solidifying the process of posting Round About items to MyGate homepage. Tom H. proposed that HR announcements might be good to begin putting on MyGate homepage. Everyone was in agreement.

**Problems w/International Student Names Being Entered Incorrectly:** We need to determine when third party IDs are created and when official documentation on internationals is received. Brantly Travis will check to see when the third party IDs are created. After finding this out, Jim McCoy would like to go meet with IIS admissions people to discuss the process with them.

**Academic Training for Entering Grades:** Tracy reported that training is to begin this Friday. Linda Miller wondered if there are other issues that need to be addressed with faculty in these trainings. The possibility of identifying power users within the different colleges that could be sources for training new employees was discussed. It was felt that perhaps on-line training resources/videos would be appropriate. The team also discussed the need for on-going routine (perhaps one or twice a semester) training. Tom H. shared that HR (in approximately twelve months or so) plans to have some indepth routine new employee training sessions which might be a good avenue to advertise these other training sessions/tutorials which are available. It was decided that we would look at this again next week.

Jim McCoy shared that he feels this should be brought before MART to help in identifying these resource people and he could come back with a recommendation. CTLT is to be responsible for coordinating and scheduling these trainings, advertising them and doing the on-line registration. Core members will create a listing of modules that need to be covered in trainings, how long the training will take, and who will be the contact person. Members will submit this information to Linda Miller and she will pass it on to CTLT. Individuals submitting modules should also be thinking about how to structure the online training.

**Update on Open Issues:**

* Phyllis Baurer is working on council enrollment reports that are due October 1st. Tracy has a couple of things still to identify.
* Brantly reported that they meet a coupld of weeks ago regarding EEO reporting and have since investigated what information is available in Banner. They plan to run reports in Banner (except November and December in Cognos) and then convert over to what is needed. The codes 40 and 50 are reversed from what we need for reporting. They will run test reports, with the final report being run the last pay period in October. Brantly feels it will be very time consuming, but otherwise not too bad.
* Wind Star interface – still in Test. Brantly will check with Mark regarding the status.
* Shawn Cooper is working with Tracy on evisions. There a few little things still to test. The piece needed by the 15th is done.
* Anita was in touch with TouchNet last week and scheduled to move to PROD on October 9th. They are moving to the 5.0 upgrade.
* Paper copies of web admissions forms are still being worked on.
* Tracy reported there has been no movement with the advising hold removes issue. MART is aware of this and has communicated down the channel to faculty (per Jim McCoy).
* Load degree records into PROD academic history. . .Tracy shared these are waiting on her. She has found they need to be done ASAP rather than by November 1st.

**Cognos Reporting:** A listing of contact persons for reporting needs was created and is as follows:

 Accounts Receivable: A. Poyner and J. Dudley

 Finance: D. Blackburn, E. Dale, J. Dudley (budget), and A. Sasseen

 Financial Aid: S. Lapinski and L. Mitchum

 Human Resources: T. Ray and Lisa

 Payroll: S. Jennings and J. Dudley

 Student Employment: J. Thorn

 Student: T. Rogerts (Registrar), Lesa H. (Admissions). And S. Haley (Provost)

 Institutional Research: Fugan

 EEO: C. Duffy

Linda Miller will send this list to Core for review. Upon approval she will send to ITAC and also on Procedures Central and the myGate Support tab.

**xTender:** Linda miller reported that the schedule in Decemberincludes two hours of consulting and then analysis in January with training in February. Linda will forward email containing the schedule to Core team members.

**Duplicate PIMs:** Tracy reported that she is waiting on Shawn who is juggling with evisions and transcripts. Right now Tracy’s immediate need is to enter a specific M3 and be able to obtain a list of all reports this M# is associated with.

**iOffice:** Brantly shared that everything is working correctly with iOffice. The only issue is identifying future admissions.

**Phone Book/People Finder:** Do we want to use the Home Org or two digit level for department identifier in people finder? Using one over the other does not give 100% correct match for all of campus. Brantly will give the list to Jackie for review.

**Open Discussion:**

* In order to prepare for Banner 8 upgrade we must upgrade Oracle. September 25, 28, 29 or 30 were possible dates submitted by Dave McKenna. Tracy shared that these are the dates of faculty training for web grades. She stated that she could not agree to Test being down prior to October 2nd.
* The September 17th maintenance will be moved to September 24th because Mark is out on the 17th.
* Luminis licenses – it is believed that a separate license will be needed for version 8 of Banner.
* Published schedule of clone dates would be helpful as well as when others will be scheduling training, etc. that will need to use Test. Team members were asked to consider this and come back with suggestions.
* Human Resources is still using a lot of Condata data that is stored on the mainframe. Brantly said it will be difficult to move data off to a readable format or take pics of current reports as of a certain date. There is not a good answer. We can get the data, but we have no way to tie it together. We have until the mainframe goes away (approximately next February) to figure out a solution.

Meeting adjourned at 11:35 a.m.