

ERP Business Operations Team

Meeting Notes

MEETING LOGISTICS

Item	Description
Date	June 11, 2014
Time	1:30 p.m.
Location	MESHEL HALL – Computer Center Conference Room

ATTENDEES

Facilitator(s)	Rick Marsico
Note Taker	Linda Frattaroli
Participants	Pam Balent, Mary Lou Castner, Katrena Davidson, Rosalyn Donaldson, Bob Forchione, Becky Geltz, Jim Hanek, Jeanne Herman, Sarah Kessler, Gloria Kobus, Dennis Konik, Jennifer Lewis, Dennis Konik, Ken Schindler, James Stanger, Steve Taraszewski, Jason Thomas, Bob Tupaj, Angie Urmsen-Jeffries and Alisha Yanniello
Not Present	Catherine Cala, Sue Davis, Lori Hinebaugh, Jonathan Jenyk, Loren Lease, Lisa Reichert, Millie Rodriguez

AGENDA ITEMS

CORRECTIONS	Notes
Impl Mtg – 12/12/12	Email any corrections to Linda Frattaroli
PRESENTATION AND DISCUSSION	
REVIEW PRIOR ACTION ITEMS	
TEAM STATUS UPDATES/ISSUES	
1. Admissions (Sue Davis)	No Report given.
2. Advancement (Pam Balent)	Pam brought to our attention that Advancement was granted permission to make employee address changes and wanted to bring up some issues that raise concerns being that they are integrated with all of the modules and some examples given was if a change of address is made how will it affect a billing for insurance premiums or a final payout for those who are retired or resigned and will changing the address affect other tables where it can affect reporting? Gloria informed the group that there is an address code in Student billing that is not to be changed and would not pose a problem as long as the code is not changed. Jennifer brought up employee is active until their employment terminates after their final payout. The part-time faculty remains active for three years due to intermittent nature of their job. Normally when addresses are changed, (EPC) the Employee Authorization to Change Personal Data form is used and submitted by employees to HR and the form is forwarded to Payroll department in order to update School district tax information and a copy goes to the employee to be filed in their departmental and the Benefits division also receives a copy of the form. According to HR department, if a mailing is being returned, the employee should be contacted first before making changes to an employee address. It was also suggested if we allowed the employee to make their own change of address in self- service banner and what impact that would make. Jeanne inquired on where we are in the progress of Clean Address installation as a viable solution and Jason indicated that it has not yet been installed in the production instance. More discussion will be made between the HR and Advancement departments.
3. Distance Education (Millie Rodriguez)	No report given.
4. Employee Processing Center (Jennifer Lewis)	It was brought to Jennifer's attention in a meeting that the letter was sent out regarding year-end (July 1 st totals) for occasional service employees that are now considered hourly employees that are logging time and on the bi-weekly schedule and will not have the clean cut off of June 30 th and will run fiscal year totals based on that. There are only a few semi-monthly employees left.

5. Faculty (Loren Lease)	No report given.
6. Finance (Mary Lou Castner)	Mary Lou reported the July 1, 2014 new fiscal year-end roll into 2014/2015 will begin on Thursday, July 10, 2014 and both Banner Finance and SciQuest/eCube will be unavailable for the entire day and will be available again on July 11, 2014; However, in the past the process was completed sooner and if that is the case this year, the Finance department will send out a communication to the campus community when Banner Finance and eCube will become available. To address the questions on how this will impact Student, Payroll, and Accounts Receivable, Mary Lou explained that only Banner Finance will be down and other modules should not be impacted and those departments will be able to do their work; Alisha asked if HR should not be adding any data during this time and Mary Lou concurred.
7. Financial Aid (James Stanger)	No report given.
8. General Person (Steve Taraszewski)	<p>Steve informed the meeting attendees about the request from YSUnity and Safezone Advisory Council (forwarded by Jeanne) regarding the use of a preferred first name which is collected in Banner and there are 4884 people using the preferred first name that is loaded on (SPA PERS) and (SPB PERS) is where the data is stored. This deals mostly with transgendered students that go by another name that might not be reflective of their chosen gender; Brian Wells is asking if we can look at the possibility of using the preferred first name for Class rosters and staff use for Advisors & CSP Coordinators. This is being used at the University of Vermont and shared Banner programs with other institutions. Steve gathered input and Jeanne explained that in Banner you can use the preferred name, but it would not reflect on their rosters. Brian wanted to align this with the existing non-discrimination policy that does embrace the diversity portion. Questions were brought up about if it would mean changing how the rosters appear online or is there a report that Banner generates? Jeanne added that we would probably need a modification to the official name and was inquiring on a better way to accommodate this request. Banner allows you to capture the official name in SPAIDEN, but faculty and advisors only have self-service access in Banner. Sensitivity training was a suggestion that would promote using the preferred first name. YSU participates in Campus Pride campus climate index and one of the notations made was that while YSU collects this information, it does not provide the full use of preferred first name in Banner. Bob Forchione offered to look into Banner documentation to see if anything is coming down the pipeline and will research it and get back to Steve.</p> <p>Steve also wanted to add another problem that came up with social security number change especially for Graduate Assistants (GA's) who are considered employees as well. When a graduate student ID is changed, a record is sent to the State (IC) for Grad School and International students who are teaching a class. This becomes problematic when their institutional assigned ID is trying to match a new number assigned when doing faculty demographics and Graduate student new ID number does not match Institutional Reporting. When it does not match, they have to reopen the State file to get correct student ID and social security number. The new GA social security number changes should be communicated and Bob Forchione added that there is a log in Banner that reports when a social security number changes. If the number changes in Banner, it must change at the State level. The 999 number is reported until student gets a temporary social security number. Records are sent to the state and when it changes in Banner, reports are given to the State and the report should reflect those GA's that taught a class. Alisha added that there is WebFocus report that prints out the 999 numbers. HR will work on sending this list for students and employees for social security numbers changes.</p>
9. Graduate Studies (Angie Urmsen-Jeffries)	Angie reported she is working with Bob on GRE scores coming directly into Banner and is testing Graduate School Admissions; preparedness has changed and is no longer doing un-recalculated GPA and working with Bob to find a new place to house the un-recalculated GPA's. She is also working with Alisha on RGA's and working on a better way to process them. Alisha talked to Steve about PeopleAdmin and how to load position descriptions through each department and will get Angie familiar with the PeopleAdmin piece and Rosalyn will assist with the training. Bob Forchione added that regarding the CRM system that Millie is working on and making changes and informed Angie that all the data is loaded into the test system and Millie will show how to access the system to go in and start testing the data.

10. Human Resources (Alisha Yanniello)	Alisha and Jennifer are both almost finished with the leave reporting and will be working on Chairs July 1, 2014 and then Faculty after negotiations are completed. Alisha has started on accessing direct deposit online on self-service Banner. Dennis and Alisha are still working together on this before it will be announced to campus community. She is also working on open enrollment through benefits and on self service. She has also been working on electronic personnel actions forms. Through PeopleAdmin, it is going to feed over into Banner and will stop paper pushing for new-hires terminations and promotions and will be uploaded into Banner more quickly and efficiently. E-class changes were not updated and some people are getting missed in targeted announcements. Also, the new employees that were put into the system are not generating e-mail addresses and this will be brought to Dave Kitt's attention.
11. Institutional Research (Becky Geltz/Steve Taraszewski)	No report given by Becky. See above for Steve's report on General Person
12. MyYSU /Luminis Portal - (Bob Tupaj)	Bob reported that they are moving along with portal groups and getting those moved into Blackboard.
13. Payroll (Lisa Reichert)	No report given.
14. Reporting/BI (Jim Hanek)	Jim reported on the BI project and Mary had submitted the project information but has not yet heard back from Charles Howell, Dean of Beeghly College of Education. Before they can proceed any further, it has now come down to departmental costs. WebFocus 7.7 is up and running. On the reporting end, they are pulling a great deal of data for CSP and Metro Credit and analysis is being done in these two departments as far back as 2007.
15. Student Accounts (Gloria Kobus)	Gloria reported that Students Accounts has changed the department name to Office of University Bursar and asked those of us who have not already done so to change any documentation that has the department name of Student Accounts to the new department name. Gloria also added that Touchnet now has the ability to do mobile payments and the department of Advancement and Alumni Development were especially interested in this but will still be working through this until later in the year.
16. 15. Student Accounts (Jonathan Jenyk)	No report given.
17. Registration & Records (Jeanne Herman/Sarah Kessler)	No report given.
18. Technical / DBA (Jason Thomas)	Jason attended the Ellucian Live conference, he reported that there is a requirement from Ellucian to add an additional six columns to every table inside of Banner which entails having to test all YSU written programs or reports that insert into Banner tables because inserts can fail if there is only 10 rather than 16 columns, it can become a problem. Jason met with Rick and divided up YSU programs based on the analyst and their system, so one of the analysts in your area will be in contact with each area. This will take at least two to three months before putting it into Production and should not encounter any big problems. One of the analysts in your area may call for help and ask you to check into their programs and make sure they run in ADVM. Since Touchnet does insert a lot into Banner tables, Jason will be looking specifically at Touchnet and will check with Jonathan to be sure it does not encounter any problem; He does not foresee it to be a big problem as initially anticipated. The goal is to have this installed into Production by October 2014 and without doing so, we cannot upgrade Banner and cannot go into XE version. There are no more current Banner upgrades as of December 31 st and these will no longer work because they will not be compatible.

19. Training (Rosalyn Donaldson)	Rosalyn is working with the Office of One Stop on their integration of LiveAgent into the YSU portal to enable students to be able to correspond with the One Stop office via chat and e-mail. They are working on the IT side to get this implemented and there will be a training piece on the other side to bring awareness of this chat software so students can interact with the One Stop department using their mobile devices for texting/e-mailing through Live Agent. She is offering Banner Finance training on a monthly basis typically the third week of each month. There is not as much of a need for Banner Navigation training due to less new hires and as far as the academic side, Jeanne is holding down the fort with the prevention of writing reports off the data so there are not as many requests for writing reports in WebFocus and typically requests are for running reports. There is Compliance Training that has just begun for all employees on campus who are mandated to complete Compliance Training in order to comply with Title 7 and Title 9 guidelines.
20. Workflow	Open Discussion.
NEW BUSINESS	

New Action Items / Issues	Owner	Due Date	Status
1. NONE			
Prior Items / Issues	Owner	Due Date	Current Status

Next Meeting – **Wednesday, September 10, 2014** at **1:30 p.m.** in Meshel Hall, 4th floor conference room.