

# ERP Business Operations Team

## Meeting Notes

### MEETING LOGISTICS

Item	Description
Date	June 10, 2015
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, Bob Forchione, Jim Hanek, Jeanne Herman, Lori Hinebaugh, Jonathan Jenyk, Sarah Kessler, Jim Kleeh, Dennis Konik, James Stanger, Jason Thomas, Bob Tupaj, and Angie Urmson-Jeffries
Not Present	Catherine Cala, Sue Davis, Rosalyn Donaldson Becky Geltz, Jonathan Jenyk, Gloria Kobus, Loren Lease, Jennifer Lewis, Lisa Reichert, Millie Rodriguez, Steve Taraszewski, and Alisha Yanniello

### AGENDA ITEMS

CORRECTIONS	Notes
Impl Mtg – 12/12/12	Email any corrections to Linda Frattaroli
PRESENTATION AND DISCUSSION	None
REVIEW PRIOR ACTION ITEMS	
TEAM STATUS UPDATES/ISSUES	
1. Admissions ( Sue Davis)	No Report given.
2. Advancement (Pam Balent)	<p>Pam reported that the transition of the fund raising function from University Development to the YSU Foundation (YSUF) is complete, with the exception of the monthly push of various updates in the Alumni system to YSUF. The project to develop that process was ceased at the Foundation's request, so currently there is no flow from YSU to YSUF; however YSUF is sending monthly address changes to YSU. The project has been put on hold until YSU is requested to restart, and Computer Center has staffing available. Pam is still receiving requests for donor lists and has been fulfilling them with the caveat that information is through March 31, as the YSUF will need to fulfill those requests in the future. Pam is still responsible for all Alumni requests. Pam, Maureen, and Dennis are reviewing Membership Module processing, reminders, and renewal procedure. They are going to set up billings for life membership payment plans, as they were never billed, missing thousands of dollars. They plan to have the review completed by the end of September, and then begin the set up process of creating reminders.</p> <p>Pam received a request from Carrie Anderson to link Simplicity with Banner to upload Student Activities. A CSR will be completed for this project, with the hopes of working on later this summer. Pam requested to have all reference to Advancement changed to Alumni Engagement in the CSR system.</p>
3. Distance Education (Millie Rodriguez)	No report given.
4. Employee Processing Center (Jennifer Lewis)	No report given.
5. Faculty (Loren Lease)	No report given.
6. Finance (Mary Lou Castner)	Mary Lou reported Banner Finance for new fiscal year 2015-2016 begins on July 1, 2015. The year-end roll is scheduled for Thursday, July 9, 2015. Banner Finance and eCube will not be available that day. In the event the system becomes available earlier in the day, there will be a

	<p>communication sent (perhaps by noon) when it becomes available. Student, Payroll, and Account Receivable modules will still be able to continue processing, but the Banner Finance will not be available and cannot run any interfaces at that time. The interfaces that usually run in the evening should still be able to run and will not impact the normal process and schedule. Mary Lou explained that anyone entering purchase requisition entries for the July 1 new fiscal year may enter those for the general fund; however, if you have any other types of funds like restricted gifts or grants; they will have to wait until after the year-end roll to enter requisitions after July 9, 2015.</p>
<p><b>7. Financial Aid (James Stanger)</b></p>	<p>Financial Aid completed installation of new release for the year for student loans. Banner was not ready to have the release in time for Summer semester. Along with 40 schools across the country, including Wright State and Kent State, the beta release was installed and turned out to be an absolute disaster since it had not been tested. The beta release along with 15 patches was installed by Jason Thomas who was able to get the installation done and everything was cleaned up.</p>
<p><b>8. General Person (Steve Taraszewski)</b></p>	<p>Lori Hinebaugh presented report for Steve - Institutional Research Jane was asked to make changes to STD Major to remove (in the description) defined as CCC, LCCC, Lakeland College/ locations that had multiple majors out there with the description that had these majors and wanted to remove the description, but it was going to cause some problems and those who were looking at this description to find out who are in these majors. Supplemental data was added and SDE on STD major so you will be able to see that particular major and if you are earning a degree at Lakeland or at CCC. Jim Hanek will be putting into WebFocus. Eventually there will be a few more changes and Jane will be removing and modifying the description. For example, Allied Health will have 8 selections available. Behind the scenes in SDE, there will be different locations where these can be stored. There is also an online SDE column added and you will know which majors are offered online and which ones are not. It will no longer say online in the description of the major. If there is anyone concerned with these changes in majors, you may contact Lori and she will provide the SDE fields. Although these are being populated at this point, the description has not yet been removed since there are a few programs that have to be changed first.</p>
<p><b>9. Graduate Studies (Angie Urmson-Jeffries)</b></p>	<p>Angie reported the Graduate School as of last week has purchased the recruiting and admissions software from Ellucian so they are working on bringing them up to speed.</p>
<p><b>10. Human Resources (Alisha Yanniello)</b></p>	<p>Dennis Konik gave report in the absence of HR/Payroll attendees and reported findings during their measurement period in June for the Affordable Care Act; Alicia and Dennis identified about a dozen part-time staff that may need to be offered health care for next year since they have been working more than 30 hours per week. Those that have rose to the top of their reports will be looked into further as some have four or five different types of positions and then they will be forwarded on to Evelyn. There are only a few more to look and they are forgiven 30% of employees and if they do not offer health care, they are able to go to the Exchange; if there is less than 30% of our employees, we will be good for this year and then it goes down to 5% next year and it may affect about 100 people. It has been rough going the last couple of years and has been very complicated; a combination of a Banner report and YSU written report was used and between the two, there are some differences, and some instances where the report did match up well.</p>
<p><b>11. Institutional Research (Becky Geltz/Steve Taraszewski)</b></p>	<p>No report given.</p>
<p><b>12. MyYSU /Luminis Portal - (Bob Tupaj)</b></p>	<p>Bob reported that the portal announcement e-mail messages are transitioning over to the YMES e-mail system developed by Jim Kleeh. The link to access YMES is located in the e-Services for Faculty and Staff channel on the Home tab. Ken is looking to wind down portal usage for sending e-mail announcements with the transition to YMES. Bob is working with Human Resources to set up a tab of channels in the Test portal and they will be used for internal information and forms for faculty and staff. They are looking to move a number of those items off of their website and into the portal.</p>

<b>13. Open Source &amp; ERP Programming (Jim Kleeh)</b>	Rick welcomed Jim to his first meeting with the EBOT team and Jim reported that nothing has been finalized as of yet for his area.
<b>14. Payroll (Lisa Reichert)</b>	No report given.
<b>15. Registration &amp; Records (Jeanne Herman)</b>	Jeanne reported that Doug had sent an e-mail about taking the system down in June and wanted to remind us that the last Saturday of SOAR is on June 20, 2015. From the times of 12:30 until 4:00 PM is when the system will be hit at the heaviest time. There should be no Saturdays in July for SOAR. There should be approximately 150 students at that time. Jeanne found a glitch in Clean Address while running monthly clearing house job, she found that students can go in and inactivate their permanent address. This will affect jobs not running for those that contain no active, permanent address. Jeanne has talked to Tim about this and does not have a fix. Wait Listing is a huge success. On average there are about 230 students wait listed for different sections and it changes frequently. It has been a very good process and running smoothly. The students have been actively using this with little to no direction.
<b>16. Registration &amp; Records (Sarah Kessler)</b>	Sarah reported they survived the Application for Graduation and having to open simultaneously with the new process and found a few new things along the way and are working with Canice to make some enhancements and improvements going forward. Canice was commended for doing a great job.
<b>17. Reporting/BI (Jim Hanek)</b>	Jim reported an update on the last meeting regarding the two new summer terms it should not impact any of the HEI/BI data snapshot being stored. Information Builders (IBI) was onsite to upgrade to WebFocus 8. They met with the representatives as far as WebFocus 8 and got the software downloaded and uploaded the server software on the Test system. Jim has not had a chance to work with the DEV studio and APP studio which will replace the DEV studio; this will probably entail much training and he will look into both of these by next month. We are close to the point of possibly cutting ties with Brian Godsen on running HEI captures. Steve is doing some testing with his processes so if we are able to match, this is a small step forward for HEI. Until there is an official announcement of when ties will be cut, you can make your requests as usual as we still have Brian on contract until then.
<b>18. Student Accounts (Gloria Kobus)</b>	No report given.
<b>19. 15. Student Accounts (Jonathan Jenyk)</b>	Jonathan reported that they suspended the TEST clone for 3 weeks for the purpose of testing AR 8.5.0.3. Thanks for everyone's patience. As of June 4, 2015, 8.5.0.3 was installed in PROD.
<b>20. Technical / DBA (Jason Thomas)</b>	In regard to Banner 9, there have been a few technical calls with Ellucian. They have a recommended testing environment set up as far as servers/sizes. There will be meetings scheduled with the IT group that is involved. They will come up with a document stating how they will install it and the week afterwards there will be some phone calls scheduled with Ellucian. The actual install won't be until the first week of August. There are some workshop/training for functional users and will be all Student related for the first run. If anyone needs to know when the exact installations will be, Jason will send an e-mail to everyone on the list on with what areas and when the install will take place. They have split Student out into 15 different applications. You will still be able to get to old Banner Forms and SSB. We hope to be one sign-in. It is completely different on the architecture being used now. In response to Mary Lou's question, there will not be any time for Banner upgrades unless there is a requirement. The only upgrades that are run are for Financial Aid and those federally required. If there are any that are needed, send Jason an e-mail requesting your needs. In July there is a release of one upgrade on gainful employment reporting and mandated by government for Student Accounts in Jeanne's area.
<b>21. Training (Rosalyn Donaldson)</b>	No report given.

<b>22. Open Discussion (Bob Forchione)</b>	<p>Bob Forchione reported that with International Applications are now live either at Royall or Graduate Studies has it in SSB and this is new for us and is a big step to have non-paper applications. Bob noticed while testing that the common matching rules are not very strong. The last time they were changed was in 2005. He made an edit to the one for regular students and the edit Bob made in test it seemed like it was much stronger and wants to have the undergraduate people test this in order to scale down duplicate PIDMs. With International applications, there is no social security number and the basis for common matching for Student is by the social security number. Bob wants to create a brand new common matching rule for international students only. He wants to figure out what is important and know what to look at when system automatically flags and it does not find much due to not having social security numbers. The first two rules are based on socials and would like to run this in test, and if it is successful, he would like to have this put into production. Jeanne is highly supportive of going over the matching rules, but her submissions to the clearing house in Banner must have a number in the social security field; otherwise, the student information is not getting sent. Jeanne would like to be assured that the field will be populated with a number. The common match on paper is only on paper. Graduate Studies are processing applications to a point and then they are passed over to International Studies. The numbers for socials are not working well and when there are duplicate PIDMS and Alumni and Student is the area that requires cleanup of duplicates. The undergraduate side is where the creation is made, the Provost made the decision that all applications are processed whether or not the application fee is paid. Therefore, the applications will go up in numbers and is the easiest group to make duplicate PIDMS. Bob asked if Jeanne can open the CSR to request the change and so she can approve it.</p>
<b>NEW BUSINESS</b>	

New Action Items / Issues	Owner	Due Date	Status
<b>CSR Request for Common Matching Rules.</b>	Jeanne Herman		
Prior Items / Issues	Owner	Due Date	Current Status

Next Meeting – **Wednesday, September 9, 2015** at **1:30 p.m.** in Meshel Hall, 4<sup>th</sup> floor conference room.