ERP Planning Group Minutes

Date: August 10, 2016

Attendees: Donna Artho, Jacob Chandler, Somer Franklin, David Hammonds, Rose Kader, Matt McKnight, Scot Mertz, Chuck Mize, Mary Robbins. [Phone]: Tessy Rappe, Renee’ Starns, Heather Thielemann, David Verghese, Amanda Withers

Agenda:

1. Welcome & Good things (All)
   A. Mary – My Success Planner has taken off; will open to Faculty in Spring
   B. David H. – Kicked off the PeopleAdmin and Banner Interface this week
   C. Renee’ – Corporate Travel Planners (CTP) training for campus next week

2. Needs (All)
   A. Dave H. – Discuss with IT the Payroll and HR Nell Programs for Employee History
   B. Jacob – Need beta testers ASAP as TCC just released a patch for ERS file uploads

3. Legacy (SamMenu and Nell Menu) Decommissioning Update (Chuck)
   A. Chuck presented an update on the progress of the decommission
   B. The decommissioning is still on track (see Legacy attachments)
   C. Donna Artho to work with Chuck to add any new reports to inventory within Data Cookbook. These reports would be conversions from Legacy systems.

4. Banner XE Update
   A. Experiences with the new Transformation pages for HR, Finance, General
      i. Amanda and Renee’ – Issues with length of timeout. IT is working with security.
      ii. Renee’ – Issues with address types in invoices and requisition not showing
      iii. Renee’ – AP and Travel approval queue screens – issue with the multiple screens where before it was just one
      iv. Matt – Payroll reported issues with saving output with jobs. Request in to Ellucian.
      v. Amanda -
         ➢ to follow-up with Delynn to report an issue where a user is taken to the wrong screen
      vi. Mary – had a positive report on the student registration process (see video)
         ➢ http://www.shsu.edu/dept/registrar/students/registration/how-to.html
   B. Jacob reminded the Group that we are early adopters of XE and to report any issues through Cherwell
   C. Rollout Finance, HR, and General to the rest of Campus
      i. Discussed the October date is still good; however, would like to do a pilot with power users before then for further testing
         ➢ Amanda to spearhead pilot groups with Renee’ and Tessy
         ➢ Inform IT of the names of those in the pilots
   D. Student module redesign, AP and Financial Aid
      i. Will rollout in the same manner as the rollout for HR/Finance/General
Make sure those affected have test plans in place and look at the forms

E. Banner TSUS XE rollout will be in Spring 2017

5. ERP Operating Model (Jacob)
   A. Discussed the need to be more systematic and thoughtful on the process of how to request software solutions
   B. Slide 7 of the presentation is the proposed operational planning framework to help guide all users through the process
   C. The goal is to ensure that IT is involved before a selection of a software solution is made to help with predictability and deliverability of the solution
   D. With the Group agreeing on the general concept, more work is to be done with this model to document and formulize the steps and the expectations

6. Adjourn

Attachments:
1. Legacy Decommission Project Update as of 8/10/2016
2. Nell Update PowerPoint
3. ERP Planning Process PowerPoint