

## Banner 8 Client Meeting – February 11, 2010

Attendees: Alex Garcia, Mrinal Virnave, Mike Zimmerman, Dee O’Larey, Jennifer Gabel, Sujey Aguilar, Lupe Aragon, Minerva Galaz, Lorraine Ortega, Art Trujillo, Gary Black, Joaquin Gonzalez, Paul Berver, Shawna Arroyo, Missy Giacomelli, Angela Lopez, Kim Montoya, Jesus Hernandez, Bruce Schaa, Siiri Rogers, Olga Conter, Pamela Roggow, Pam Jeffries, Lori Montoya, Abdulmalik Al-Gahmi, Kim Eiland, Kathy Montoya, John Roberts, and Laura Ramirez

- Shawna – Communication Plan
  - We need to discuss who needs to be contacted, when, and how. Pam referred another University’s website to prepare from
  - Contacts
    - Student – Mike, Kim, and Siiri
    - Fin Aid – Virginia, Janie
    - HR/Payroll - Pamela
  - Per Pamela, she doesn’t know if something will be sent out separately by Finance, Lori G.
  - Shawna will forward the Communication Plan to Alex to be put on the Banner 8 website
  - There is a Systems List of about 70 items. Per Mrinal, some systems will be down for a couple of hours while others will be down for the duration of the upgrade
- Housekeeping – Alex
  - GO LIVE – March 25<sup>th</sup> – March 28<sup>th</sup>
  - Client Testing closes tomorrow Friday, February 12, 2010
- Updates – Alex
  - Student
    - Admissions (Lupe): 98%
      - Still doing IPEDS testing. Jesus feels this is not Banner 8 related, but Pam says that it’s coming from PBAN and should be tested
      - Q: (Mrinal) Is this something that feeds into Banner and needs to be tested? A: (Bruce) This needs to be tested when coming into the online application
    - Registrar’s (Kim E.): 100%
      - Completed – ready to sign off
    - Fin Aid (Mike Z.): 95%
      - Ready to sign off
      - They are waiting for packaging testing and perhaps some other functional stuff

- SIM (Siiri): 95%
      - Still need to test Cognos and ODS stuff
      - No problems encountered
  - Finance
    - FIP (Gary): 95%
      - There is a Purchasing form with a defect and a patch is available in version 8.4. This deals with requisitions
      - Perhaps ICT can look at the new version of program. Gary has been requested to send information regarding this to Banner 8
      - Optional Scripts
        - Gary will send to Banner 8 as well
        - Kathy has one additional script that was sent to Gary
        - Kim E. already sent an e-mail to banner 8 for an optional script that has to do with Registration and Pre-Reqs
    - UAR (Angie): 100%
      - Everything is working fine
      - Brian has been testing
    - SPA (Kathy): 99%
      - Waiting on Grant Process
      - Need another Payroll to run in order to re-test this
    - AUX (Missy): 99%
      - Still testing Adirondack. Currently Rich is working on this
      - Everything else is working okay
  - Human Resources
    - Payroll (Abdulmalik): 80%
      - Payroll 2 is being worked on by Delia. It is still open and hasn't been completed yet
      - The pending items are holding up the testing
      - Pamela feels that they have completed more than 60% of their testing
      - There may be issues with reporting to external agencies after speaking with Pam
      - ESS/HR Upgrades – have tested ESS and it is working. Still need to test HR upgrade per Pamela
      - E-Hire/Workflow – requisitions have run through to Workflow; this is not happening in PBAN

- E-Hire/EPAF – to be tested by next week per Abdulmalik
  - Leave Report – it has been fixed now – it was a sequence problem; ensure this works during Go-Live per Mrinal
  - SNN and Expanded Fields – Q: (Abdulmalik) Is there a Banner-wide communication that says how long these should be? A: (Mrinal) No.  
Q: (Abdulmalik) Is there a way to set them up so that we do not increase the size? A: (Mrinal) Jesus, can you please check if this feature can be turned off?
  - Special Characters – Q: (Abdulmalik) Can we turn this off Banner-wide? A: (Mrinal) No, only for certain things, but not Banner-wide
  - Q: (Alex) Will HR be more confident when next Payroll run is complete? A: (Pamela) Yes, we are concerned with EPAF and external stuff
  
- FAB1099 Issue – Gary
  - Have AP retry this, maybe test this afternoon
  
- FRRGRNT Issue – Kim M.
  - Fiscal Year issue with Appworx
  
- CAPP Issue – Kim E.
  - Has to do with prerequisites; defect submitted to banner 8
  
- EPAF/E-HIRE Patch – Abdulmalik
  - No solution found; HR has a work-around
  
- Adobe Flex – Alex
  - Q: (Alex) Are we going live with this? A: (Mrinal) Does not have a secure connection, therefore we can't go live with this
  - It is ok for testing purposes, but not to go live with in Production per Mrinal
  - Per Kathy and Pamela it is ok not going live with it. But still would like it by the end of the year? If it is secure by then, then we will address this at that time per Mrinal
  
- Mac Computer Issue – Abdulmalik
  - There is a user that is having problems with Banner, Workflow, INB, SSB, etc. on her Mac Computer.
  - Abdulmalik will provide the Client's name so that ICT may look into this issue further
  
- External Feeds – Mrinal
  - Ñ – this is coming up as CTRL-Z. Ñ and special characters are being extracted

- ERB doesn't like these. Banner has a patch and we need to test. Now we have to do the install, run, and test per Mrinal Q: (Mrinal) Can this be fed and tested? A: (Pamela) Yes
- Olga wants Pamela to retest thoroughly before sending to ERB. We were already sending ñ before to ERB per Mrinal. This is to be tested next week because we had no notion of this being a problem until now
- Cognos was tested and everything came back fine per Olga. Feed to Barnes & Noble via Cognos also seems to work fine, too. We need to test though and compare the files per Mrinal
- ERB – Pamela to test; Cecil to assist
- SSN – Pamela to test. Although, this will be harder to test since we can't feed it. ICT needs to be involved per Mrinal. It's an Appworx job
- HED – can't accept special characters per Kim E. so she will contact the agency and test
- HED Fin Aid – Olga, Ray, and Candie to test
- IPEDS – Candie creates a report and feeds it; SAS program runs against ODS; already feeding to ODS (only aggregate data – so need to worry per Kim E.)
- UBN8 Fin Aid Upgrades
  - These will be done after the clone, due to affecting the code tree and data required for Payroll
  - Per Siiri, the 8.6 upgrades are needed to be in sync with what's in PBAN
  - ICT to get back with Siiri about Fin Aid Upgrades
- Refresh for Payroll
  - Q: (Abdulmalik) UBN8 refresh, what needs to be done? A: (Mrinal) We need to let HR know when the clone and export is done
  - The clone to UBN8 will be done by Tuesday
  - When Payroll testing is complete, please send an e-mail to Kim M. so that she can start Kathy's testing
- Letters – Jesus
  - Lupe tested letters in UBN8 and accents are not coming forward
  - SunGard will not fix this and they know it's an issue. Jesus is looking into this
  - Admissions does not use special characters so there will be some clean up afterwards in Banner
- Reports Testing - Mrinal
  - Q: (Mrinal) Has Payroll been testing reports also? ODS or Banner Reports being tested? A: (Pamela) We have been testing both types of reports
  - RS has tested the administration of them, but not the reports

- Lori M. said that Liz ran some Payroll reports for them. ADM has been testing reports and working with HR on this. The Labor Redistribution report was tested, too
- Q: (Kim E) Is there a back-up for Paul? A: (Paul) Art has been helping with the automation process and we have shared the load with the other DBA's
- DARS/AdAstra – Kim E.
  - Q: (Kim) Who is going to ensure these are working technically? A: (Mrinal) We will assist, but we need Kim E. and others to let us know and will have to retest afterwards
  - Q: (Missy) Is this true of the list of 70 systems? A: (Mrinal) Yes
- Not Recompiling Forms/Processes in UBN8
  - Q: (Mike) Which shell is PBAN going to be? A: (Paul) Data coming from PBAN; UBN8 is the master compile that's out there
  - Q: (Kim E.) Why are we not recompiling what has already been tested in UBN8? The reason for asking is due to the issues encountered with the recompiling of Forms/Processes for training in the Summer
  - Per Mrinal, we recompile 3 types of programs
  - Job submission recompiles and TRNI have been fixed for now
- GLOLETT – Should be OK with Process recompile and Form changes per Mrinal
- Important Dates
  - Optional Scripts – Finalize by February 25<sup>th</sup>
    - Q: (Kathy) Where are the patches we need to review?
    - A: (Alex) On the 2<sup>nd</sup> page on the Banner 8 website
  - Finalize Test Plans - February 18<sup>th</sup>
    - Send in by Thursday and Sign-off
    - Will be posted on the website
  - GO/NO-GO based on testing only – February 18<sup>th</sup>
  - March 1<sup>st</sup> – Done on the Client Testing
    - Q: (Kathy) Will we no longer be able to test in UBN8?
    - A: (Alex) It will still be available, but DBA's will have 1<sup>st</sup> priority to the instance
  - March 16<sup>th</sup> – Tech GO/NO-GO meeting
  - March 18<sup>th</sup> – FINAL GO/NO-GO meeting
    - We need to determine who needs to be here to decide
    - Need a consensus from everyone on that date

- Upgrade to begin March 25<sup>th</sup>
  - Target is still by mid-day per Pamela
  - Q: (Alex) Do we need Finance feeds afterwards? A: (Gary) No, we can hold them
  
- Project Calendar – Has been updated and is up on the website
- ZHIDIST – Kathy
  - Q: (Kathy) Will the changes be done?
  - A: (Mrinal) We won't go live with it, even though the form is ready by Crystal, but hasn't been tested
  
- Development in Banner 7 – Mrinal
  - We were to freeze development work in Banner 7 by January 1<sup>st</sup>. However, this was not enforced. Therefore, the freeze is effective as of now
  - Any bugs, we will try to fix now. But if it can wait for Banner 8, then that would be best
  - Q: (Lori M.) Does this include Appworx process changes, freezes, etc? A: (Mrinal) If it affects DBA resources, then we may need to hold off
  
- Removal of DBAN/UBAN – Mrinal
  - DBAN 7 is currently connected to DODS 8. However, we would like to make DBAN a Banner 8 instance
  - Q: (Mrinal) What does it change for ADM? A: (Lori M.) Nothing, currently we are going through UODS for our stuff
  - We have permission to get rid of DBAN and create it as Banner 8 version
  - Date has not been decided for the removal. ICT will notify the Clients of this