

**BANNER USERS' GROUP--STUDENT**  
Amended Minutes of Meeting February 1, 2007

- **Call to Order:** Terri Tomblin-Byrd called the meeting to order at approximately 2:15 in Drinko 439.
- **Members Present:**

Sonja Cantrell	MCTC
Roberta Ferguson	Registrar's Office
Marilyn Fox	College of Health Professions
Michelle Duncan	AD Council
Pat Gebhart	Computing Services/Enrollment Management
Myke Watts	Computing Services
Mike McGuffey	Institutional Research
Nadine Hamrick	Financial Aid
Cheri Musgrave	Financial Aid
Carol Kolski	Bursar
Kelli Raines	Admissions
Scott Taylor	Office of Recruiting
Christina Adkins	Residence Services

- **Minutes:** January minutes approved as submitted.
- **Correspondence:** No report.

**COMMITTEE REPORTS**

- **Subcommittee on Billing:** No Report.
- **Subcommittee on CAPP:** No report.
- **Banner Oversight Committee (BOC):** The last issue discussed was with regard to the Finance Process that couldn't run and looking for a time to take the system down. Since the last meeting there has been some progress made on finding ways to deal with it without having to take the system out of commission. Terri met with Bob right after the last Oversight Committee meeting two weeks ago. The finance group and finance information technology group took Terri's suggestions and are working piecemeal through the process. They did some work on identifying documents that they felt could be cleaned up or deleted and Terri worked on finding a method for them to work their way little by little through the process. Terri has not heard back from them so they are either making great progress or haven't started. So taking the system down is off the table at this point in time.

It generated conversations out in community about other things that were not associated with taking the system down. It was a positive process. If nothing else, it has opened up some of the lines of communication and awareness of other things that are going on.

Progress is be made in dealing with account maintenance processes. But nothing formal or official at this point.

## **OLD BUSINESS**

- **myMU/MILO:** Spam filters were discussed a couple of months ago where one was turned on and it didn't work really well so it was removed. There has been another one put on called Barracuda, which has decreased the amount of junk mail received. However, it has blocked Connect2 emails, but there are settings that can be adjusted to let certain items get through. The Help Desk can assist with any questions or assistance if needed.

There will be an extended outage Sunday morning during the maintenance window. It will be down for approximately two hours to do some defect patches on that environment. They normally get started around 7:00 or 8:00 in the morning.

- **Human Resources/Finance:** No report.
- **Performance and Priority Issues:** No report.
- **Banner Student Privilege Request Form:** No Report.
- **Multiple PIDM/Person:** Scott and Kelli have been running the report and have some suggested changes to improve the report. It is being run after each load of information at this point. Just like Financial Aid is doing, and it did catch some things and the clean up process has been going on for those that have been caught. The two things to look at is the issue of a duplicate showing up without their mate next to them, so John Smith might be there but there isn't a second John Smith right next to it. Terri started a process of looking at that and at least in a couple of the instances, there is a mate somewhere else on the report. There was an instance where there wasn't a mate on the paper, so Terri will check the logic to figure out what is putting that one occurrence on there but not putting its mate somewhere else. In most cases it's the same Social Security Number, where John Smith has a SSN and Susie Homemaker has the name SSN. So there are two different places on the report by the way it's sorting because it is sorting by name and the readings on GUASYST. Perhaps in the not too distant future we will talk about other offices running it and different scenarios outside even this User Group, into the Finance and HR world, because those are the ones most devastating when people are paid under two different numbers. So hopefully they can be in the mix where they are actually running at the beginning of each pay cycle so they can catch it before a payment is actually made.
- **CTC Shared Service Issues:** Last communication centered around Campus Codes and there was some confusion and needed clarification on some of the issues around what the folks in the colleges could or could not update. Terri has not received anything on the specific issues that the colleges have been having. Nadine clarified that they couldn't update Campus Code and no one knew why they could not. Michelle was unable to find anyone who has update privileges to come up a list of directions. Perhaps they have access but they are just not doing it correctly. So if someone could come up with

directions on how to change a campus code, then they could find out who has access and who does not access. Nadine recommended Lisa Penix in CTC, because she has made changes. Roberta inquired if the problem was on the SDNSTDN form, where the Registrar's Office makes the change on the SGASTDN form. Terri thought the campus code was actually in the same block as the field of study. Per Roberta, Campus Codes were left out of the curriculum rules, but it could be added back. The problem occurs when a student transfers from one campus to another and whoever updates this information does not have access to change the campus code. Roberta indicated that it could be put in the curriculum rules so that when you populate the program code it could be tied to a campus code. And that would help in Admissions as well. Every night a script is running to update the general student record, but does not flag campus codes. By the time Nadine receives an exception report in Financial Aid, it is usually fixed. It runs by fund codes, and if the fund code does not match their college, then she goes in and cancels out the incorrect funds and adds the correct funds, if funds have paid backs the incorrect funds off and repays the correct funds. Nadine has only had one or two recently because of the nightly script that is running. This updates after the fact, but they have been trying to come up with a way to change business processes so something doesn't have to run in the background updating information, that it's actually done at the proper point in time. Roberta has a concern in giving more people more access that it could make things more out of sync than if just a few people have access. Two options are: To look at having it default from the program code, but the other issue is to update undergraduates to be sure there is consistency and they were all 1's for Marshall. If there is a program code to default in the Community College and not defaulting in all other undergraduate campus codes, there is still a problem and is not consistent and can create problems down the road. So it either needs to default by program code or make that field updateable to the colleges who are doing the input.

Roberta has a question, because she sees it all the time, if someone goes in to update a student record and they don't duplicate the term and they update it like the student was in University College but you change, and then the record shows they were in the second college since the day they were admitted. What effect would that have in an audit situation? This happens all the time because the colleges aren't real good about duplicating the record for the next effective term. When a transcript is printed and a student has been in University College for three semesters and then all of a sudden they show in the College of Business since their very first day in the door. That is a concern of Roberta's because there are not consistently utilized practices. Nadine doesn't feel they would do anything with regard to Financial Aid funds, since we were reacting to our Banner student system at that point in time. The University had that student in all their major records at that point in time that we actually made the award to the student and then three semesters down the road their College changes retroactively would create a Bursar fee problem which I think would be caught at that time for correction. If it is discovered in the prior semester, then the financial aid would be changed within the same academic year. But this has never occurred in an audit issue to date, because usually the audits are in September of the following year. Roberta reported that it has happened on VA audits with the Registrar's Office.

Terri mentioned on a lighter note that a lot has been done at the AD level of retooling, retraining to avoid that particular scenario. The best solution is education.

The National Student Clearinghouse extracts was discussed at length. Terri was in a meeting this morning and Roberta reported on the separation of enrollment files and the

graduation files for Community College versus University and Terri pointed out some of the processes will change in the next version of Banner, 7.3x, which is scheduled for implementation in May. We've never reported our graduation data, which we are supposed to be doing, and we've never separated Community College and University, which we are supposed to be doing, and we've never reported summer enrollment to the National Student Clearinghouse, which we are supposed to be doing, so we decided to cure all of our omissions at one time and start doing all three with the goal being summer. And if summer is missed, it will be fall.

- **Administrative Solutions Project.** No Report.
- **Campus Codes.** Back to campus codes that wasn't discussed in CTC Shared Service Issues. Campus code is being updated on the General Student record. When Terri was working on the upgrades in pre-production to the next version of Student, they delivered scripts to run to check different things and one of the biggest things that came back with 4,000-some-odd records was campus codes and student records didn't match. When the updates are applied sometime around Memorial Day, those campus codes will have to be synchronized properly. That will be the magical date when we will have to start using the information in the curriculum table and not the information back here to do our reporting and selecting and that sort of thing. It shouldn't be assumed that both tables will be maintained for a time. But Cheri Musgrave had an understanding that for Financial Aid, it would take years to get everything moved over to the curriculum tables. Terri recommended reviewing the technical guide on concurrent curricula that actually specifies how to retrieve the proper curricula information. Using the student record is not what they recommend that you ever do from that point forward. It was stated at the last SCT Summit meeting that Financial Aid would no way be able to be totally dependent on the curriculum table and it would be a long time in coming.

The documentation for the versions of Student that are in pre-production are out there right now for review if anyone wants to.

Conversion is running now on anyone that has not had it run before. And a requirement for this version is that all curricula needs to be converted before bringing this up live. So a decision will have to be made on whether it is necessary to run the conversion process again for everybody or just go back and pick up the people that have never had it run. Terri is just now running scripts to see how bad the data is out there.

- **Concurrent Curricula:** Discussion covered in the above Campus Code item.
- **Version 7.3:** 7.3 should be synonymous with the May release of Banner that occurred last May. But as we're going through some updates and processes, we're finding that we actually are choosing to move to an even later release of some of the products that have a June release or an October release. So when all the points are defined, Terri will post so everyone can see them. There was a 7.3.1 release that came out in October, so its six months after the 7.3 release. What is now in pre-production is Student 7.3. In the next few days it's going to be Student 7.3.1. Because there are enhancements in 7.3.1 for National Student Clearinghouse project. Also, for concurrent curricula, that has been delivered in phases, Phase 1, Phase 2, and currently in production we're on Phase 3. Student 7.3 is Phase 4. Phase 5 was slated to be released with Banner 8, but concurrent

curricula Phase 5 is in the Student 7.3.1. And the concurrent curricula committee decided to go to that instead of doing one and then turning around and to the other. The nice thing about 7.3.1 is there is now a duplicate button for the curricula to cut down on the amount of typing. It hasn't been tested yet, but it will be installed in the next few days in pre-production. And strongly encourage everyone to go in and start looking at it to know what's coming. So read 7.3 and 7.3.1. In the release guides there is a concurrent curricula function chapter and concurrent curricula technical chapter. Our goal is to get everything into production by Memorial Day. It shouldn't be a surprise to anyone that this is what we're pushing for because we have to get this in place so we can continue to process Financial Aid after their regulatory release that comes out in the spring.

- **New Recruitment System Connect2:** System is updated by Banner once a week and deans receive a list of students interested in their college once a week which includes the admits and all the students that have expressed interest. Once they create their VIP page there is a certain communication path that Recruiting has set up to respond to their interest. It is set up so that at 7 days in the system they get a certain email response, and then at 21 days they get a different email. No matter where they entered the system or what time they will go right into that mailing pattern. There are 100,000 students presently in the system and that is multiple years of students.
- **Oracle release:** Every quarter there is a new security patch sent out by Oracle. They are not immediately put into place, but January's is being working on. Daylight Savings time has been changed, so adjustments will need to be made within the Oracle software.
- No further old business to address.

#### **NEW BUSINESS:**

- There is a concern with regard to faculty and recording of faculty information in Banner as far as making sure that there is a clear understanding within these colleges on what information they should be putting in about their faculty, what information they can put into Banner and areas in which Banner falls short with regard to faculty information. And a lot of that pertains to those that are going for tenure and all the things that are involved in that and just all those different types of things, what papers has a person published and on and on and on, which gets us into the conversations about faculty databases. In many cases Banner does not even have a home for some of the data that may need to be recorded. There was a demo by Digital Measures on software that takes it to the next step beyond Banner. It is designed to interface with Banner and can be modified to enter that type of information. It was a positive meeting. Not sure if it will be purchased and put into place, but it all leads back to what is in Banner and what's coming out of Banner. Jan Fox has requested this be worked on to improve upon it. Terri is not sure where this process begins, but assumes it is happening in the deans' offices where the information as far as faculty is getting entered. The record keepers in the deans' office are the ones that update the data. Sometimes it goes to the Chairs. Full time faculty comes out of the deans' office, but the part time faculty is done in the Chairs' office. It used to all be in the Dean's office.

It was reported for several years Banner in HR has been using coded comments and someone in each Deans' Office is supposed to be maintaining by 3-character code for important information. There are two to three places within Banner where they keep

tenure status and rank. The Deans would be the body of people for review and discussion who deal more with faculty issues. Sherri Noble maintains some of the data in a separate database of her own and she does this because there is no place to record it in Banner. She would like to have it housed in Banner. There needs to be a defined process and procedure for everyone to follow. There are little pieces but not the whole requirements document. There may be other areas that have other needs.

- Residential Services is looking for software to make check in time easier, because check in the fall is a headache with so many new students. Christina indicates they have found several programs that will work with SunGuard Banner, but wants to know how to get something like that implemented into Banner. Terri advises setting up some meetings or demos to include most of the people that need to be involved like a technical person, someone from administration in order for the purchase to even happen. The Oversight Committee will have to review it because of the current procedures in place that anything that interacts with Banner needs to go before that group for review. So get people to come in, do demos, look at it, talk about it, get references of other institutions that may be doing it and if it's deemed worthy of funding, it will get funded and then you would work with somebody in computing services to get the interface between it and Banner. And it could be a lengthy process.
- The question was raised with regard to document imaging. This was looked at, but nothing has happened. SCT has one called Extender Solution, but when reviewed initially eight years ago, it did not meet our expectations and was not cost effective. Bob Walker had a demonstration this week of an imaging product. It is the same company that is partnered with SCT to do their full Extender Solution, but this is a stand alone purchase, but it does the document imaging, so it takes the document and converts it to an electronic image. But the way they have proposed it to this institution is as a stand alone. But the institution has not made any movement on an enterprise imaging solution at this point. There is not enough push to get it funded. Finance at this point is the only one viewing, so anyone interested may want to discuss it with Bob Walker.

#### **ANNOUNCEMENTS**

- The next BUG-S meeting will be March 1, 2007.

#### **ADJOURNMENT**

- Meeting was adjourned at 3:30 p.m.