

Salesforce Team Leader Committee

Date: November 3, 2025

Time: 3 PM – 4 PM

Attendees: Nkenge Bergan, Paige Eagan, Lori Evans, Ben Herbert, Sarah Hubbell and Mike Thompson

Absent: Lois Baldwin, Bob Bechtel, Michelle Schultz, James Valliere

Guest: Cara Blaim

1. SharePoint Implementation

- A SharePoint site has been established for the committee, aligning with the college's broader direction.

2. Salesforce Backup Software

- Enhanced backup and restore capabilities will improve resilience in case of major incidents.
- Discussion included exploring application data support, with emphasis on “backup-to-backup” functionality.
- Student application data should be stored with data capturing who processed the application and when.
- Proposal: Create records that automatically index to student records.
 - Document imaging to be stored in a separate database.
 - Records may be converted to PDF and indexed for retention policy compliance.
- Discussed the Dynamic forms for International and Health Career students and how will it be integrated to capture required data.

3. Edify Integration

- Need to establish parallel workgroups to outline each department need.
- Compliance report discussed.
- Edify will consolidate and store data from Salesforce and Banner.
- Discussion on handling of private data.
 - **Action Item:** Verify whether private data is being collected.
- Flexibility noted: processes can be modified as needed.
- **Timeline:** Edify will replace Webfocus in 3 years.
 - Departments must identify which reports they currently use in Webfocus.
 - A spreadsheet will be created to track departmental reporting needs.
 - Reports will need to be rebuilt internally.
 - Goal: Develop dashboards to reduce manual report building.
- Emphasis placed on strong guardrails for data processing.

Salesforce Team Leader Committee

4. Other

- Training hours from the purchased class are running out.
- Resources will be dedicated to converting existing flows into new designs.
- Assistance may be required due to complexity of the process.
- Training needed for conversion processes, particularly for complex workflows.
- **Action Item:** Reach out for additional training courses.

Summary of Action Items

1. Verify whether private data is being collected.
2. Create departmental spreadsheet of Webfocus reports.
3. Reach out for additional training courses.

Meeting Adjourned: 3:40 pm