



ELLUCIAN BANNER STATUS REPORT

JUNE 20, 2023

We are entering our fourth month of the Banner project and the project is on track. Currently, there are four Banner modules being worked on: *Student*, *Finance*, *Human Resources*, and *Financial Aid*. Ellucian uses an iterative approach, meaning they deliver functionality in pieces. Each iteration expands what is available by following the process of gathering requirements, building/configuring the system, conducting testing and remediation, then repeating the process. All four modules have completed at least one iteration.

● STUDENT

- **In progress:** The last month was light on workshops due to conflicts such as graduation and other blackout periods that limited the ability of the entire team to get together. The workshops have started again with training in General Person. Banner treats everyone as a “person” meaning employees, students, vendors, and retirees are all tracked in the same area.
- **Look-ahead:** The upcoming period should see a couple of concurrent efforts. First is mapping students from MySite into General Person (remember that everyone is a general person). The team started moving into Catalog, Scheduling, and Registration in the later part of June and will continue in early July. Once these are complete, we will move into the design review and configuration for these modules, repeating our iterative approach.

● FINANCE

- **Completed:**
 - A new Ellucian finance consultant has joined the team. The initial load of the newly designed Chart of Accounts (COA) has been completed and loaded into the test environment with assistance from the Ferrilli finance consultant. This is a big milestone accomplishment and required a lot of extra effort by the Finance team to complete.
 - The district-wide demo of Jaggaer *Procure to Pay* occurred on June 1st with over 150 attendees.
 - The Ellucian finance consultant was on-site 6/14/23 - 6/15/23, providing training to the team on COA maintenance and the basics of journal entries. He is also covering default reporting available from Banner.
- **In progress:** The team has been reviewing the results and making necessary adjustments.
- **Look-ahead:**
 - The next couple of weeks for the finance team is a blackout period so they can focus on the fiscal year end close. We will start on other finance portions in mid-July with more testing and validation once the blackout is lifted.
 - Looking further out, we will start working on budgeting and purchasing features that are delivered with Banner.
 - A decision on using Jaggaer or ESM for procurement should be made within the next month.

• HUMAN RESOURCES

- **Completed:**
 - The Ellucian team loaded the workbooks containing our business rules and configuration.
 - Several integration sessions have been completed to start mapping out how the systems tie together.
- **In progress:**
 - End-to-end reviews and testing of the workbooks are in progress. Adjustments are being made to the system as part of this effort.
 - The Ellucian HR consultant was on-site 6/14/23 to 6/15/23.
- **Look-ahead:** Up next for the HR team is more work on the configuration and conducting end-to-end testing on what has been configured via the workbooks. In early July, the team will start working on mapping employees into General Person and by conducting a preliminary load of employees into Banner. In mid-to-late July the team will start working on position control.

• FINANCIAL AID

- **In progress:** The Financial Aid team continues to work on the workbooks.
- **Look-ahead:**
 - The Financial Aid team will tackle COD and electronic loans, Title IV authorization, and transfer monitoring once the workbooks are complete.
 - Student employment configuration will be addressed.

• GENERAL/TECHNICAL

- The [project charter](#) has been completed and posted to the [website](#). You can find the latest copy under Documents on the upper right of the Banner SharePoint page.
- A project timeline retreat was held on 6/15/23 to discuss the overall project timeline.
- District IT and Research attended an initial demo of the Insights reporting system on May 16th. The goal is to replace the inFORM data warehouse with Insights. In late July, Insights training will be conducted.
- Identity Tactical Planning is the integration of Banner with our network Active Directory and integration with other systems. The workshops started on 5/15 and are continuing into summer.
- District IT is working with Ellucian to conduct workshops to identify the integrations between Banner and external systems such as parking, bookstore, transcripts, CCCApply, NeoEd and we expect to have approximately 200 integrations.
- Ferrilli provided an early draft of the Organizational Change Management Plan.
- On July 20th Ellucian will be conducting a demo of the CRM Recruit tool, used to help recruit students.

