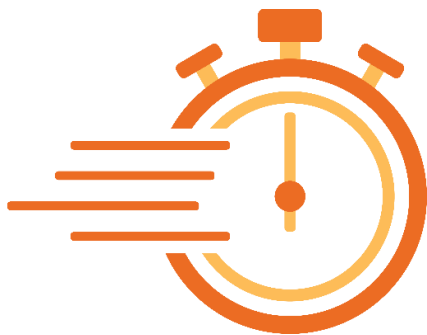## TEAM BRIEF

WHO: This status report affects all areas on the backend (development), but not day-to-day users...YET

WHAT: The project is on schedule and on budget. All four modules have completed at least one iteration*

WHEN: Status report - August 2023; **Go live date – Summer 2025**

WHERE: Online, across all campuses and the district office

ELLUCIAN BANNER STATUS REPORT

AUGUST 2023

It is hard to believe we are now five months into our journey! **The project is on schedule and on budget.** Four Banner modules are being worked on at the moment: **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**
  - **Completed:** *General Person* (student-persona) design, training, mapping components
  - **In progress:**
    - o Design review for *Catalog*, *Schedule*, *Registration*, *Records/Academic History*
    - o Data extraction from Workday and MySite with completion target: 3rd week in July
  - **Look-ahead:**
    - o Ellucian *CRM Recruit* and *CRM Advise* demos will be on 7/20 and 8/7, respectively
    - o Pending completion of *Catalog*, *Scheduling*, and *Registration* modules, work will begin on design review and configuration of each, repeating our iterative approach

- **FINANCE**
  - **Completed:**
    - o Training for *Chart of Accounts* and *Journal Entries*
    - o Timeline and project discussion with Syntellis (budget management)
    - o Syntellis implementation schedule created with February 2024 start date
  - **In progress:** Ongoing negotiations for procurement solution with completion target of 2nd week in August
  - **Look-ahead:** Work will begin on *Accounts Payable* and *Purchasing* modules, pending wrap up of fiscal year-end close

- **HUMAN RESOURCES**
  - **Completed:** Initial design and creation of the position control table (list of job codes)
  - **In progress:**
    - Position control data file (job codes) being loaded into test environment in mid-July
    - Extracting *Employees* data to combine with *Students* data into *General Person*
  - **Look-ahead:** Will start updating and testing the loaded position control file (job codes)
- **FINANCIAL AID**
  - **Completed:** Discussions and designs related to *FISAP* (FA form) have been completed
  - **In progress:** Work paused for student semester activities
  - **Look-ahead:** Consultants will work on documentation regarding using the systems
- **GENERAL/TECHNICAL**
  - **Completed:** *Experience card* (students/staff user interface) kick-off meeting
  - **In progress:**
    - Discovery session for Banner *Document Management* (to replace current document imaging system, *ImageNow*)
    - *Identity Tactical Planning* (user authentication) is nearing design completion
  - **Look-ahead:**
    - *Experience card* (user dashboard) development will begin 7/24
    - Banner *Document Management* (document imaging) and *Insights* (to replace current reporting tool, *Inform*) will begin week of 8/1

GLOSSARY

- **Ellucian**: The company that created Banner, the enterprises resource planning (ERP) system
- **Experience Card**: The user interface that will show visual squares with functions for users
- **FISAP**: The Fiscal Operations Report and Application to Participate (FISAP) used by schools to apply for yearly funding and to report annual expenditures
- **General Person**: Banner treats everyone as a "person," meaning employees, students, vendors, and retirees are all tracked in the same area
- **Identity Tactical Planning**: User credential and authentication methods
- **Iteration**: A Banner building process of gathering requirements, building/ configuring the system, conducting testing and remediation, then repeating that process
- **Position Control Data**: Information associated with every job position; a code assigned to a job
- **Syntellis**: Software for budgeting, planning, and spend management