



## 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. HR and Finance module implementation extended.
- WHEN:** Status report – Sept. 2023; **Go live date – Summer 2025**
- WHERE:** Online, across all campuses and the district office

# ELLUCIAN BANNER STATUS REPORT

SEPTEMBER 2023

As the summer months come to a close, we cross the six-month line of our project! Late July and early August saw moderate activity due to the fiscal year-end and the start of a new term, but **the project is on schedule and budget**. We are still focused on the core four modules: **Student**, **Finance**, **Human Resources**, and **Financial Aid**.

**HR and Finance Note:** Project leadership met in mid-June to evaluate benefits, costs, and risks and determined that we will continue with the planned implementation schedule for all modules, but HR, Finance, and Payroll will run in the background until July 1, 2025.

### • STUDENT

#### • Completed:

- Demos for *Recruit* and *Advise*
- Extractions of MySite student records for initial load into the Banner *Student* module
- Initial design and configurations for catalog management, schedule management, registration, and records/academic history

• **In Progress:** Conducting training/testing on catalog, schedule, and records/academic history

• **Look-ahead:** Focus will be on the beginning of the academic year and registration training

### • FINANCE

#### • Completed:

- Vendors have been loaded and tested
- Each Foundation's chart of accounts has been loaded

• **In Progress:** Negotiations are ongoing for the procurement solution

• **Look-ahead:** Finance team will move ahead with Accounts Payable as the next module

## • HUMAN RESOURCES

### • Completed:

- *Position Control* (job code) data was loaded into the test environment
- HR team extracted and worked with the Ellucian to load active employees into Banner as part of the *General Person*. \*\*Important Note: The term *General Person* is a key change from our current Workday/MySite way of operating, as they were two separate collections of people, but in Banner, they are one.

### • In Progress:

HR Team is testing data for employees in *General Person* & *Position Control*

- **Look-ahead:** The HR Team will spend the next 30 days focused on data conversion and then start on onboarding and hiring training

## • FINANCIAL AID

- **Completed:** Data mapping exercises

- **In Progress:** Data extraction to load into Banner

- **Look-ahead:** Financial Aid team meetings to resume in early October

## • GENERAL/TECHNICAL

### • Completed:

- On-site assessments conducted with Banner Document Management consultant
- Held kick-off and several workshops for the *Insights* data warehouse & reporting tool
- Demo for Ellucian regarding what was built for CVC-OEI (California Virtual Campus/Online Education Initiative)

- **In Progress:** Starting a series of 20+ technical workshops related to *Ethos* (a tool used to move data between Banner and other applications)

- **Look-ahead:** DOGS (Data Organization and Governance Standards) team meets regularly and develops strategies to keep our data safe, clean, and useful; further announcements coming soon

## GLOSSARY

- **DOGS:** Acronym for Data Organization and Governance Standards team
- **Ellucian:** The company that created Banner, the enterprises resource planning (ERP) system
- **Ethos:** Tool used to move data between Banner and other applications
- **General Person:** Banner treats everyone as a “person,” meaning employees, students, vendors, and retirees are all tracked in the same area. The term *General Person* is a key change from our current Workday/MySite way of operating, as they were two separate collections of people, but in Banner, are one
- **Insights:** Data warehouse and reporting tool
- **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

