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 – Nov. 2023; **Go live date – Summer 2025**

WHERE: Online, across all campuses and the district office

ELLUCIAN BANNER STATUS REPORT
NOVEMBER 2023

October was a transition month, both for the seasons and the Banner Project. Over the summer and into September, the project covered a lot of ground in configuration and design. From October and through the end of the year, the focus is on data conversion and preparing for the integration of third-party applications that will begin after the winter break. Examples of the third-party tools include purchasing (Jaggaer), budgeting (Syntellis), recruiting (NeoEd), and student onboarding (CRM Recruit). In just under a year, applications will arrive and class schedules will be built in the new Banner system – all in support of the Fall 2025 Registration. Review the *Look-ahead* sections below to learn more.

The project is on schedule and budget. We are still focused on the four core 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:**
  - Training for CA Add Authorization and Calculated Drop (state-specific rules for adding/removing students)
  - Conducted Student Data mapping to move data from MySite to Banner
- **In Progress:**
  - Extracting data from MySite for Banner load
  - Evaluate using CRM Recruit to import data from CCCApply
- **Look-ahead:**
  - First Banner data load from MySite
  - Building integrations between Banner and other applications

FINANCE
- **Completed:**
  - Overview of Accounts Payable modules
  - Grants and Grants Billing overview
- **In Progress**:
  - Banner Finance security review and design
  - Grants module discovery, design, and configuration
- **Look-ahead:**
  - Start integrations between Banner and third-party products
  - Extracts for the second round of data conversion
  - Working on the archiving strategy for historical data

HUMAN RESOURCES

- **Completed:**
  - Completed the second round of data extracts and sent them off to the Banner team
  - Held an *Insights* reporting tool training for Human Resources
- **In Progress:**
  - The HR team is wrapping up data validation
  - Starting HR onboarding and hiring processes in Banner
- **Look-ahead:**
  - Begin work on FLAC (Faculty Load And Compensation) requirements, design, configuration, and training

FINANCIAL AID

- **Completed:**
  - Design/Configuration sessions for *Return to Title IV* and self-service Banner
  - SAP (Satisfactory Academic Performance) configuration and setup
  - Loading of Financial Aid data into Banner
- **In Progress:**
  - Verification and validation of converted data
  - Preparing for new year (2024-25) updates/delivery
- **Look-ahead:**
  - Schedule a training for the new year roll process (rollover of selected aid year-specific information)
  - Validation of data load

GENERAL/TECHNICAL

- **Completed:**
  - Held an initial workshop on card selection and design for the Ellucian Experience
  - Held project planning meetings for multiple third-party products, including *NeoEd*, *Syntellis*, and *Chrome River*
  - Workshops on the *Insights* reporting and data warehouse tool
- **In Progress:**
  - Starting a series of 20+ technical workshops for *Ethos* - a tool used to move data between Banner and other applications
- **Look-ahead:**
  - Student-specific workshop on *Insights* reporting
  - Banner *baseline business process* reviews
  - DOGS (Data Organization and Governance Standards) team meets regularly and develops strategies to keep our data safe, clean, and useful; additional 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
- **FLAC:** (Faculty Load And Compensation) merges faculty information from Student and HR systems and creates faculty assignments and pay
- **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
- **Ellucian Experience**: *Experience* will be the portal and main entry point into Banner for most users

For more information visit the Team Banner homepage.