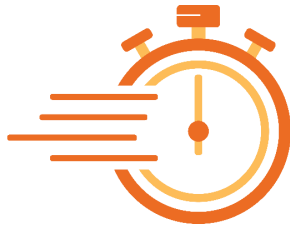## TEAM BRIEF

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

WHERE: Online, across all campuses and the district office

ELLUCIAN BANNER STATUS REPORT

DECEMBER 2023

The end of the year is quickly approaching, and this is our final update for 2023. In November, the teams worked hard to prepare information extracts from our SIS (MySite) and Workday to test the data conversion programs. Several teams focused on testing the configurations made in the prior months and making minor adjustments, as needed.

Planning for 2024 activities is well underway, with meetings and activities planned once we return from Winter Break. The first half of January has minimal planned activities as the teams concentrate on the start of the new term. The new year will focus on data conversion and beginning the integration of third-party applications. Examples of third-party tools include purchasing (Jaggaer), budgeting (Syntellis), recruiting (NeoEd), and student onboarding (CRM Recruit). Student applications will start to arrive and class schedules will be built in the new Banner system in just under a year to support the Fall 2025 Registration. Review the *Look-ahead* sections below to learn more.

The project is on schedule and budget. We continue to focus on the four core modules: **Student**, **Finance**, **Human Resources**, and **Financial Aid**. A fifth **General/Technical** area covers initiatives in support of the four core modules.

HR and Finance Note: Project leadership met in 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:**
    - The first subset of student data was extracted from MySite and loaded into Banner
    - Evaluated using CRM Recruit to import data from CCCApply
  - **In Progress:**
    - Initial Banner data load from MySite continues through January 2024
    - Validating data loads, e.g., Student general
    - Extracts from MySite, e.g., Catalog, Student overall, Academic History are targeted for January 2024
  - **Look-ahead:**
    - Building integrations between Banner and other applications
    - UAT (User Acceptance Testing) will begin Spring 2024
- **FINANCE**
  - **Completed:**
    - Overview of Accounts Payable modules
    - Grants and Grants Billing overview
  - **In Progress**:
    - Validating data loads performed in November (e.g., vendors)
    - Working on the archiving strategy for historical data
  - **Look-ahead:**
    - Start integrations between Banner and third-party products
    - Extracts for the next round of data conversion
- **HUMAN RESOURCES**
  - **Completed:**
    - Completed HR onboarding and hiring processes in Banner
  - **In Progress:**
    - The HR team is wrapping up data validation
    - Focus on rule validation and validation tables reviews
  - **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
    - Initial SAP (Satisfactory Academic Progress) rule writing occurred
  - **In Progress:**
    - Scholarship Universe project planning
    - 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)
- **GENERAL/TECHNICAL**
  - **Completed:**
    - Held additional workshop on card selection and design for the Ellucian Experience
    - Held the first group of technical workshops
  - **In Progress:**
    - Starting a series of 20+ technical workshops for *Ethos* - a tool used to move data between Banner and other applications
    - Expanding data available within Insights for reporting
    - Security setup and planning for Banner and 3rd party applications
  - **Look-ahead:**
    - Student-specific workshop on *Insights* reporting
    - Banner *baseline business process* reviews the week of December 11
    - Optional general Banner preview available to users early 2024
    - DOGS (Data Organization and Governance Standards) team meets regularly and develops strategies to keep our data safe, clean, and useful; additional announcements coming soon
    - FLEX Week presentations:
      - IVC: Wednesday, 1/10/24; 3pm – 4pm
      - Saddleback: Thursday, 1/11/24; 2pm – 3pm

Link to project website: https://livesocccd.sharepoint.com/sites/Banner

GLOSSARY

- **DOGS**: Acronym for Data Organization and Governance Standards team
- **Ellucian**: The company that created Banner, the enterprises resource planning (ERP) system
- **Ellucian Experience**: *Experience* will be the portal and main entry point into Banner for most users.
- **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
- **Preview 50:** A small subset of users, approximately 50, will be involved in targeted testing.
- **UAT:** User Acceptance Testing

For more information, please visit the Banner website