TEAM BANNER

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 – Jan. 2024; **Go live date – Summer 2025**

WHERE: Online, across all campuses and the district office

ELLUCIAN BANNER STATUS REPORT

JANUARY 2024

The winter break came and went; many would say it ended too quickly. This year, 2024, marks the start of the second year of our Ellucian Banner project and the year we will see the first modules "go live." In December, the teams worked hard to prepare extracts from our SIS (MySite) and Workday systems to test the data conversion programs. The project team and representatives from the functional areas participated in several all-day business process analysis (BPA) sessions focused on comparing baseline Banner processes to our existing processes. The new year will focus on data conversion and starting 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 – all supporting 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**.

Note: The *Banner HR* and *Finance* modules will become the official system of record as of the 2025-26 Fiscal Year. *Banner Student* will become the system of recording beginning with the Fall 2025 semester.

- **PROJECT TIMELINE**

  - Financial Aid – October 2024

  - Student – April 2025

  - HR/Payroll – July 2025

  - Finance – July 2025

- **STUDENT**

  - **Completed:**

    o Additional student data loads from MySite to Banner, again with high quality results BPA sessions comparing MySite to *Banner Student*

- o Initial technical session on the approach associated with CCCApply and how it will integrate with CRM Recruit and Banner Student
- **In Progress:**
  - o Validating data loads, e.g., Student general
  - o More extracts from MySite, e.g., Catalog, Student Overall, and Academic History are targeted for January 2024
  - o The team is working with District Research on MIS Mapping between our legacy SIS and Banner
- **Look-ahead:**
  - o Student Records Management training is scheduled for late January
  - o Building integrations between Banner and other applications
  - o User Acceptance Testing (UAT) will begin Spring 2024
  - o Functional leads training on *Insights* reporting tools begins in February

- **FINANCE**
  - **Completed:**
    - o BPA sessions comparing *Workday Finance* to *Banner Finance*
    - o Jaggaer Kick-off meeting
  - **In Progress**:
    - o Jaggaer design and technical meetings
    - o *Chrome River* kick-off and workshops
    - o Working on the archiving strategy for historical data
  - **Look-ahead:**
    - o Start integrations between Banner and third-party products
    - o Extracts for the next round of data conversion
    - o Second *Chart of Accounts* load

- **HUMAN RESOURCES**
  - **Completed:**
    - o Finished work on data validation and rule validation
    - o BPA sessions comparing *Workday HCM* to *Banner HR*
  - **In Progress:**
    - o *HR Benefits* mapping
  - **Look-ahead:**
    - o HR Benefits extraction and load into Banner
    - o Begin work on FLAC (Faculty Load And Compensation) requirements, design, configuration, and training
    - o Second General Person load

- **FINANCIAL AID**
  - **Completed:**
    - o BPA Sessions for Banner Financial Aid
    - o New year updates for 2024-25 applied to the test environment

- o   Scholarship Universe project planning
- o   Preparing for the new year (2024-25) updates/delivery
- **In Progress:**
  - o   Scholarship Universe project planning
- **Look-ahead:**
  - o   Schedule training for the new year roll process (rollover of selected aid year-specific information)
- **GENERAL/TECHNICAL**
  - **Completed:**
    - o   Held the first group of technical workshops
    - o   Created a copy of the existing Test/Development environment to a new training environment to support roadshows
    - o   Several security design sessions with third-party tools
    - o   Introductory discussion on Banner Student to Canvas integration and security setup
    - o   Ethos Integration Architecture and Design Workshops completed
  - **In Progress:**
    - o   Expanding data available within Insights for reporting
    - o   Security setup and planning for Banner and third-party applications (e.g., NeoEd, Degree Works, CRM Advise, Elevate, Scholarship Universe)
    - o   Banner Document Management needs analysis
    - o   Procurement of third-party tool to assist with user account management
    - o   A training plan including unit-specific timelines is being developed
  - **Look-ahead:**
    - o   Banner Document Management Training
    - o   Data Archive design and prototyping
    - o   Student-specific workshop on *Insights* reporting
    - o   Develop general *Banner Preview* engagement exercise available to users early 2024
    - o   Data Organization and Governance Standards (DOGS) team meets regularly and develops strategies to keep our data safe, clean, and useful; additional announcements coming soon

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

GLOSSARY

- **Business Process Analysis (BPA):** A review of existing processes and comparison to a new process.
- **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.

- **Preview 50:** A small subset of users, approximately 50, will be involved in targeted testing.

- **UAT**: User Acceptance Testing