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 – March 2024; **Go live date – Summer 2025**

WHERE: Online, across all campuses and the district office

ELLUCIAN BANNER STATUS REPORT

March 2024

As we are beginning March, we see multiple new projects starting. We have four of the 3rd party products under the *Banner* umbrella getting underway. *Jaggaer* (purchasing & contracts), *NeoEd* (recruiting & performance management), *Chrome River* (travel & expense), and *Syntellis* (budgeting) are just some of the new names we will all become familiar with in 2024. 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." A common theme for the rest of the year is the extracts from existing systems and data validation. Student applications will start to arrive, and class schedules will be built in the new *Banner* system in just under a year – all supporting 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:**
    - Student Records Management training
    - Student security roles setup review
    - Extracts from *MySite*, e.g., *Catalog*, *Student Overall*, and *Academic History*
    - MIS mapping between our legacy *SIS* and *Banner*

- o *General Person* (students) extracts
- **In Progress:**
  - o Loading and validating data, e.g., *Student General*, *Catalog*, *Academic History*
- **Look-ahead:**
  - o Building integrations between *Banner* and other applications
  - o *User Acceptance Testing* (UAT) will begin in Spring 2024
  - o *Faculty Load and Compensation* design (FLAC) and configuration in late Spring 2024
- **FINANCE**
  - **Completed:**
    - o *BPA* sessions comparing *Workday Purchasing* to *Jaggaer eProcurement*
    - o Second *Chart of Accounts* load
    - o *Chrome River* (Travel & Expense) & *Syntellis* (Budgeting) kick-offs
  - **In Progress**:
    - o *Chrome River, Syntellis, Jaggaer* integration and workshops
    - o Working on the archiving strategy for historical data
    - o Validation of the second *Chart of Accounts* load
  - **Look-ahead:**
    - o Start integrations between *Banner* and third-party products
    - o Extracts for the next round of data conversion
    - o Development of job aids
- **HUMAN RESOURCES**
  - **Completed:**
    - o Finished work on data and rule validation
    - o *General Person* (employees) extracts
    - o *HR Benefits* mapping
  - **In Progress:**
    - o *HR Benefits* data extraction & load
    - o Employee data extraction & load (*General Person*)
    - o Testing of *Payroll*
    - o Working with *NeoEd* on the *Recruit* module
  - **Look-ahead:**
    - o *HR Benefits* Loading
    - o Begin work on *FLAC (Faculty Load And Compensation*) requirements, design, configuration, and training
- **FINANCIAL AID**
  - **Completed:**
    - o Preparing for the new year (2024-25) updates/delivery
  - **In Progress:**
    - o Data extracts for academic history

- o New year roll process (rollover of selected aid year-specific information)
- o Onboarding a new financial aid consultant
- **Look-ahead:**
  - o Testing new year updates for 2024-25
- **GENERAL/TECHNICAL**
  - **Completed:**
    - o Held technical kickoff sessions for multiple technical products including
      - o *Ellucian Workflow*
      - o Experience software development kit
      - o *Enterprise Job Scheduler (ISE)*
    - o Additional security design sessions with third-party tools
    - o Introductory discussion on *Banner Student* to *Canvas* integration and security setup
  - **In Progress:**
    - o Expanding data available within *Insights* for reporting
    - o *Banner Document Management* configuration and training
    - o Procurement of third-party tool to assist with user account management
    - o A training plan including unit-specific timelines is being developed
    - o Develop a general *Banner Preview* engagement exercise available to users in early 2024
  - **Look-ahead:**
    - 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
    - o Release *Banner Preview* to the general employee population

   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