Idaho State University
Banner ERP Implementation Project
Update
Banner ERP Update

Why Do It?

- The legacy HP computer is very old technology and is no longer supported by HP
- Our database system uses very old technology
- Our homegrown system is difficult for a small IT staff to develop and maintain
- Data is fragmented across many systems
Banner ERP Update

This is not an IT project.

It is an opportunity to examine our business processes to make them more effective and efficient.
Banner ERP Update

Guiding Principles

• Banner will be implemented as delivered
  • Banner incorporates the best practices developed at many other institutions
• We will adapt our business practices to conform to Banner
• All institutional data will reside in the Banner database
• Data standards will be followed by all departments
Banner ERP Update

Creating a Unified Digital Campus

Core Modules in Production
- Portal
- Finance
- HR/Payroll
- Student Information
- Financial Aid
- Data Warehouse

Auxiliary Systems in Production
- Reporting
- Applicant Tracking
- Room Scheduling
- Housing
- Parking
- Job Scheduler
- Payment Processing
- CCER P-card system
- International Student Reporting
Banner ERP Update

What’s Coming?

• Workflow
• Document Imaging
• Modernized User Interface
• Many Modules in Functional Areas
Banner ERP Update

Idaho State University ERP Project Master Timeline

<table>
<thead>
<tr>
<th>ID</th>
<th>ERP Item</th>
<th>Start</th>
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BengalWeb Update

BengalWeb

Blake Beck
Portal Team Lead
BengalWeb Update

What is BengalWeb?

• Many people refer to BengalWeb as the overall ERP/Banner System – Technically not true

• BengalWeb is not a web page or a web site

• BengalWeb IS a Web Portal, or Web Interface, to Banner for most users
BengalWeb Update

BengalWeb is like the knot hole we look through to see what is on the other side – or in this case, into the ISU information system.
BengalWeb Update

BengalWeb/Portal Contributors

- Technical – Alicia Tauscher

- Content/Organization – BengalWeb Coordinating Committee
  Ali Crane, Cheryle Garritson, Chris Hunt, Cali Bell, Deb Easterly, Debra Ronneburg, Graham Garner, JoAnn Hertz, Sandra Shropshire, Tony Lovgren, Victoria Banales, Virginia Murphy, Weston Whitworth, Paul Winder, Sarah Mead, Libby Howe, Val Davids, Mark Levine, David Alexander

- Training – Debra Shein and Marjanna Hulet
BengalWeb Update

BengalWeb Milestones

• Employee Portal Launch Dec. 2008
  o Web Time Entry Dec. 2008

• Student Portal Launch Oct. 2009
  o Student Enrollments through BengalWeb April 2010

• First Semester Fully Online Fall 2010
BengalWeb Update

Major Accomplishments by Committee

- Training with SunGard Consultants
- Decisions about Content
- Decisions about Organization
- Hours of Discussion and Consideration of Functionality/Features within BengalWeb
- Usability Studies of BengalWeb with Employees and Students
- Multiple Successful Launches of Portal(s)
BengalWeb Update

BengalWeb Usage

2009 Unique BengalWeb Visits

2010 Unique BengalWeb Visits
BengalWeb Update

Future of BengalWeb

• BengalWeb is Dynamic and will continue to evolve

• Luminis 5.0 – more up to date user web interface experience

• Now that we are “fully launched” BengalWeb will be managed as part of the overall ERP by David Alexander
HR/Payroll Update

HR/Payroll

Ray Ludwig
Associate Director and Team Lead
HR/Payroll Update

Implementation Concerns

- Silo Data
- Lack of Internal Controls
- Limited Historical Data
- First to Go Live
HR/Payroll Update

What We Have

• Electronic Time Entry
• Greater Definition of Earnings
• Clearer Distinction of Employee Types
• Applicant Tracking System
HR/Payroll Update

By the Numbers

• E-timesheets:
  151,100 timesheets have been submitted

• Direct Deposit Notices:
  92,000 direct deposit notices went on-line

• Envelopes not used:
  94,000 envelopes saved

• Over 2,000 employees have electronic W-2
By the Numbers (cont.)

• Over 48 cases of paper have been saved
• Over 188 boxes of envelopes have been saved
• Over 2,000 special order W-2 forms have been saved
• Many hours of department staff support processing, entering and printing timesheets
• Payroll office staff are able to do more than just process data and stuff envelopes
HR/Payroll Update

Looking Forward

- Electronic PARTS form and PR form
- On-line performance appraisal
Finance Update

Finance

Karen Sparks
Associate Controller and Team Lead

Lisa Leyshon
Assistant Controller
Finance Update

Accomplishments

• Finance Module go-live July 1, 2009
• Developed Fund/Organization Security
• On-line Requisitions and Approvals
• On-line Billing and Fee Payment for Students
• CASHNet Cashiering System
• New Chart of Accounts
• Business Process Modeling
Finance Update

Accomplishments (cont)

- Campus Wide Reports
  - Accounting Activity Report
  - Cash Balance Report
- Migrated our Fixed Asset System to Banner
- Self Service Banner
- Implemented an electronic accounting and billing system for grants
- Improved departmental budget control in state appropriated indexes
- Automated Receiving
Finance Update

What’s to come?

• Banner Travel
• Document Imaging
• Convert all P-Card Reconcilers to CCER
• Central Stores Inventory and bar code system
• On-line Time and Effort Reporting
• Non-Resident Alien Tax and Reporting Software
• CASHNet E-market Place
Finance Update

What’s to come (cont.)?

• Convert all departmental Accounts Receivable to Banner
• Develop Spendable Balance Reporting for Grants
• Electronic payment to vendors and staff through Accounts Payable
• Reports
  o Grant reporting that encompasses Multi-Year Grants.
  o Detail on Accounts Receivable paid through Cashiers Office
  o Enhanced Reporting of the Accounting Activity Report
Financial Aid Update

Kent Larson, Director of Financial Aid
Jody Finneghan, Functional Team Lead
Blair Combs, Technical Team Lead
Financial Aid Update

Success – Thanks to Many!

- Marla Skelley, Financial Aid SunGard functional consultant
- Ken Whitelaw, Financial Aid SunGard technical consultant
- David Alexander, Project Manager
- Brandon Cole, Database Administrator
- The extraordinary ITS staff
- Kristi Olson and Kelli Sepulveda, Security Analysts
- The other Team Leads (Laura McKenzie, Ray Ludwig, and Karen Sparks)
- Office of Finance and Administration
- Tireless efforts of all the Financial Aid and Scholarships staff
Financial Aid Update

Milestones

- January 27, 2010 - Imported 2010-11 ISIRs (Financial Aid applicant data) from U.S. Dept of Education
- April 29, 2010 – Began packaging 2010-11 aid
- June 30, 2010 – Began originating 2010-11 loans
- August 16, 2010 – Began disbursing Fall 2010 aid
- September 24, 2010 – Verification process up to date
Financial Aid Update

The Numbers to Date

- 15,173 ISIRs (Financial Aid applicants’ data) received and processed
- 10,254 students packaged with federal aid
- Over $55M in aid paid for Fall 2010 to 9,652 students
- Over $123M in aid accepted for 2010-11
Financial Aid Update

What’s Ahead…

- College Work Study – communications to student and department about usage
- Reports – To assist in day-to-day processing and year-end reporting (FISAP)
- Satisfactory Academic Progress – First time in Banner will be at completion of Fall 2010
- New Year Roll in December/January
- Enhancements to BengalWeb
Student Information Update

Student Information

Laura McKenzie
Registrar, Director of Undergraduate Admissions, and Team Lead
Student Information Update

Project Established Guiding Principles

- Banner was to be implemented “out of the box” with no customizations
- The Steering Committee approved Data Standards Document was to be followed.
- Banner was to be the system of record.
Student Information Update

Student Team Guiding Principles

• The university catalogs would be the guiding documents
• Be committed to using a “Best Business Practice” approach
• Faculty Bodies would be consulted for options within their purview (course numbers, waitlists, curriculum etc.)
• Utilize an advisory committee in selecting the most appropriate Banner options of those available to us
  ○ This body was formed in April 2009 with representatives from each college, curriculum council, faculty senate, graduate school and central advising
Student Information Update

Data Conversion

• 142,000 General Student Records created
• 9,829,956 ISU Academic History records inserted
• 1,830,894 Transfer History Course Records inserted
• 28,324 Prior College degree records inserted
• 51,906 ISU Degrees loaded

Data Crosswalks

• 33 crosswalks containing 19,723 lines
Student Information Update

Successes!

- Admissions module went live on-time in October 2009
- Wait listing, co requisites, prerequisites and registration restrictions were implemented for go-live
- Fall 2010 Registration went live with no queues and no student lines
- Critical Registration related reports went live with registration
- Official Transcripts were printed out of Banner the day it became the system of record
- Summer 2010 Degrees were posted in Banner
Student Information Update

Future Targets

- Reporting, Reporting, Reporting
- Electronic Degree Audit system (Degree Works)
- Re-implementation to reflect the College Re-organization
- Banner 8.3 (security and access)
- Year of firsts!
Reporting Update

Reporting and Data Warehouse

Alan Egger
Faculty Coordinator and Team Lead
Reporting Update

- Banner is primarily a transactional system
- It contains some delivered reports
- Most of these are too generic to be useful
Reporting Update

Reporting Options

• Customize Banner
• Develop reporting environment (ARGOS)
Reporting Update

• HP had 25+ years of development
• Tiger was implemented on a compressed time scale, with no backfill, and a modest budget.
• We do not yet have fine grained access implemented.
• Given these observations, the accomplishments of those who specified, wrote, and delivered the ARGOS reports we have are quite impressive.
• That being said, we have a long way to go.....
Reporting Update

Finance Reports

with *Fund/Org security*

- **Accounting Activity Download** — Downloads all account information in CSV format to move easily into a spreadsheet.
- **Accounting Activity Interactive Cube** — Contains complete information on account activities, including month by month transactions, with much detail.
- **Cash Balance by Fund** — Shows beginning balance, Year-Shows beginning balance, Year-to-Date expenses and revenue, and total for local accounts.
HR/Payroll Reports

with T-Org security

- **Current Employee List** — Lists current employees based on Timesheet Organization or Department Time Entry lists.

- **Earnings Audit Report** — Shows a list of all active employees within a Timesheet Organization, including title, hourly rate, last time paid, etc. Different versions listed contain the same information organized in different ways—by account or by employee—as well as versions with more detail or with summary level information.
Reporting Update

HR/Payroll Reports with T-Org security (cont.)

- **Leave Balance Report** — Provides a list of employees and how much leave they have, including vacation, sick, comp time, etc.

- **Detail Payroll** — Provides a list of monthly payroll transactions organized by Index, sorted by type and including personnel names. Different versions are the same information sorted in different ways: by transaction date, with account codes in the document, or by employee, for example.
Financial Aid Reports
with T-Org security

- Financial Aid Work Study Eligibility — Provides a quick view of how much work study a student has been awarded, how much has been paid out, and how much is still available. Access information using student ISU ID # or Banner ID #.
Reporting Update

Student Reports

• **Application Statistics** — *Available to everyone*  
  Shows application statistics, pulled by college, program, department, and degree. Different versions are the same info sorted different ways.

• **Class Schedule** — *Available to everyone*  
  A user-friendly class schedule. Print out just your department’s classes or all classes on campus.

• **Pre-Requisite Overrides** — *Available to Deans, Chairs, and University Business Officers*  
  Provides a list of which students have received overrides for which classes, filtered and organized by college, department, course number, etc.
Reporting Update

Student Reports (cont.)

• **Registration Status** — *Available to everyone.* Shows how many students are registered or on waitlists for individual classes. Can be organized by course, instructor (Deans and chairs access only), course (by meeting time), or course (by waitlist). A final option allows filtering courses by % full.

• **Class List** — *Available to Deans and Chairs* Provides a list of all the students enrolled in a class, including ISU ID#, major, class level, credits, course grades (mid-term and final), gender, ethnicity, veteran status, and email info.

• **Enrolled Student Information**—*Available to Deans and Chairs* Provides names and email information for students and allows sorting by term, college, program, and major.

• **Enrolled Student Information by GPA**—*Available to Deans, Chairs, and Honor Society Advisors* Provides names and email information of students selected by GPA. Allows sorting by term, college, program, and major.
Reporting Update

More coming:

• Graduation lists
• Enhanced class lists (with photos ..hard)
Banner ERP Update

• More than 150 ISU staff have been involved in this project
• Each had to continue their regular, full time job while working on the project

We owe them all a very big

Thank You!