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

WHERE: Online, across all campuses and the district office

ELLUCIAN BANNER STATUS REPORT

August 2024

August has arrived, and our progress is good! We've now surpassed 18 months on the project and are approaching our initial go-live dates. In less than 60 days student applications will start coming through our new system. Banner remains a central focus for the project team, with more groups steadily becoming familiar with the platform. Although many systems won't be operational for almost another year, it's certain that everyone will notice Banner updates in the coming months with much more engagement after the new year. The momentum and activities for the Banner project are consistently accelerating, both monthly and daily.

Workshops for several big areas started in the last couple of weeks, including *Degree Works*, *CRM Recruit*, and *Scholarship Universe*. *Degree Works* is an academic advising and degree audit tool used to help students and advisors monitor progress toward degree completion. *CRM Recruit* is designed for colleges to manage and streamline their student recruitment and admissions processes. *Scholarship Universe* is a scholarship management tool designed to connect students with scholarship opportunities and streamline the scholarship application process.

Extracts and data validation remain steady activities that are being worked on for every group. Student applications will start arriving in just two months, and class schedules will be built in the new Banner system next spring for Fall 2025 registration. Review the Look-ahead sections below to learn more.

The project is on schedule and on 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 record beginning with the Fall 2025 semester.

- **PROJECT TIMELINE**
  - Financial Aid – October 2024
  - Student – April 2025
  - HR/Payroll – July 2025
  - Finance – July 2025
- **STUDENT**
  - **Completed:**
    - Catalog load
    - *Degree Works* & *CRM Recruit* overview and discovery sessions
  - **In Progress:**
    - Building integrations between Banner and other applications
    - *Degree Works* workshops
    - *CRM Recruit* workshops
    - Student Services functional discoveries (i.e. CCAP, DSPS, EOPS, Veteran, Library and Tutoring)
    - Gathering of course prerequisite requirements, *CCCApply* and *CRM Recruit* requirements for student application processing
  - **Look-ahead:**
    - Training and information sessions will continue through Summer 2025
- **FINANCE**
  - **Completed:**
    - Design approach for *Chart of Account* modifications
  - **In Progress**:
    - Development of job aids
    - *Jaggaer* testing
    - Finalization of *Chart of Accounts* for loading in September
  - **Look-ahead:**
    - *Syntellis* and *Chrome River* design sessions
- **STUDENT ACCOUNTS RECEIVABLE**
  - **In Progress**:
    - *Student A/R* design sessions
  - **Look-ahead:**

- o *Student A/R* balance data conversion & validation
- **HUMAN RESOURCES**
  - **Completed:**
    - o *Applicant Tracking* module is Live, **our first Banner-related go-live**
  - **In Progress:**
    - o Testing of *Payroll* module
    - o *Faculty Load and Compensation* (FLAC) design and configuration
    - o Workshops for *NeoEd* onboarding
  - **Look-ahead:**
    - o Banner *Employee Action Forms* design and configuration
- **FINANCIAL AID**
  - **Completed:**
    - o *Scholarship Universe* kick-off for Saddleback College
  - **In Progress:**
    - o Testing of configurations, including student loan processing and Return of Title IV Funds, the calculation required when a recipient of Title IV aid withdraws from an institution.
    - o *Scholarship Universe* workshops for IVC
    - o *Scholarship Universe* workshops for Saddleback College
  - **Look-ahead:**
    - o *TouchNet* refunds kick-off and workshops
    - o Additional *ISE* workshops and training
- **GENERAL/TECHNICAL**
  - **Completed:**
    - o Completed workshops related to custom *Experience* card development
  - **In Progress:**
    - o Procurement of third-party tool to assist with user account management
    - o Development of *Experience* cards to access specific portions of the system
    - o *Banner Document Management* configuration and training
    - o Setup of check-printing software for A/P and Payroll checks
  - **Look-ahead:**
    - o Release *Banner Preview* to the general employee population
- **REPORTING/DOGS TASK FORCE**
  - **Completed**:

- o   Completed seven Reporting Strategy Sessions
    - o   Homework for each area to identify which inventory reports can be met with "out-of-the-box" Banner reports/processes
- o   Completed two sessions to develop *Insights* security and permissions

- **In Progress:**
  - o   *Insights* security and permissions reviews
  - o   DOGS *(Data Organization and Governance Standards)* task force: Continue to meet on data definitions for Banner configuration and data

- **Look-ahead:**
  - o   *Fiscal* and *Institutional Research* strategy sessions in August

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

Link to project glossary website: https://www.socccd.edu/team-banner/glossary