

Banner Major Project Priorities for 2005-2006 (Hot Priorities Ranked 1 through 17 by Banner Chairs)

The Banner Major Project List was developed by the Banner User Chairs Committee from March 2004 through September 2004 and priorities were assigned to the top 17 projects. The Banner User Chairs Committee includes Debbie Budd and Ralph Kindred for Academic Services, Judy Young and Sylvia Rodriguez for Student Services, Kathryn Linzmeyer and Andi Schreiber for Financial Aid, Mazie Brewington for Finance, Tina Miller for Human Resources, and Dave Suhr and Jeannine Methe (Chair) for ITS. Each of the Banner Chairs presented their problems and the primary benefits of the projects proposed and then each group provided their ranking. Those major projects that are already in progress and began in the latter part of 2004 or were recently completed within the last 3-4 months are also listed for information on page 2 of the Project Priority List. These projects are also part of the top Banner priorities, but there was no need to re-rank them. Projects that are titled "Other Future Projects" on page 2 were retained for reference, even though these projects did not qualify for the top priorities. Most of the projects identified in the "Fiscal Year 2002-2004 Tactical IT Plan" have been completed with a few exceptions – ad-hoc reporting, data warehouse, and room scheduling software. These three remaining projects from the 2002-2004 Tactical Plan have been carried over into the new proposed Banner Project Priorities for 2005-2006.

The top 17 Banner Project Priorities will be submitted to the Chancellor's Cabinet in October for review, discussion, and final approval. A brief description of each of the 17 Hot Priorities is provided below. Any changes to the priority list made by the Cabinet will be reported back to the Banner User Chairs at the next monthly meeting. The goal is to finalize the "Banner Project Priorities for 2005-2006" by the end of October 2004. The Projects will then be assigned in order of priorities and based on available ITS resources. The District ITS will provide project schedules to the Banner Chairs once the initial analysis of the level of effort is completed. It should be noted that these are major projects only which require at the minimum 3-4 months of effort to complete. In addition to these major projects, the Banner User groups continue to maintain their Banner Task List that deal with maintenance or minor enhancements. In addition, there will be on-going software maintenance to the Banner modules as patches or release upgrades are required.

HOT PRIORITIES:

1. Automate Timesheets

Payroll and Human Resources would like to improve timesheet data collection through on-line means by either moving to Departmental timesheet entry, Web for Employee timesheet entry, or a combination of the two methods. The methods need to be evaluated. This new method would replace the current manual service reports. This also includes provisions to accommodate the "absence form" electronically for posting in advance of the monthly service reports. The Banner User groups affected will review the functionality and determine the procedures and policies that need to be established in this new automated environment. Discussion of electronic signatures for approval of timesheets also needs to be addressed.

2. State MIS Data, HR Staff, & IPEDS Reporting

State MIS data, HR Staff reporting, and IPEDS reporting are both term-based and annual-based exercises that require quite a bit of ITS and user resources to review the data, reconcile any discrepancies, and determine changes required in data or format to accommodate new regulations. This project task entails adding new monthly tracking and interim validation reports so review of the data can be done on a regular basis. There will also be additional report

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improvements to address more stringent reporting requirements and adjust to the new changes like FA compliance and consistency with IR reporting as well as HR and Student reporting changes.

3. Web for Finance

The new Banner 6 release provides a Web-based Finance portion of the product to allow end-users to make queries for budget and encumbrance reports, requisition and purchase order information, and invoice data. Data entry capabilities are also available for budget transfers, requisitions, purchase orders, and approval of documents. This feature will be reviewed with the Finance management for functionality and security requirements.

4. Move Community Ed to Banner

To support the expansion of the Community Education program offerings at Chabot, the ITS staff worked with the college administrators to develop an interim Community Education System utilizing MS Access. The system was released to both colleges in January 2004 to track the courses, register students, and provide management reporting. In the future, the Academic Services Banner Chairs would like to look at integrating the Community Education non-credit courses within the Banner Student module, which would require some modifications to avoid conflict with the current credit and non-credit course processing in Banner today. The integration of Community Ed with Banner is needed to provide more accurate attendance accounting for Business Services and to make fee payment processing more real-time to minimize current delays.

5. Upgrade to Touchnet Credit Card System (or possible new EPOS Pay Select being evaluated)

The Touchnet Credit Card System upgrade is a hardware and software upgrade necessary to move us from our older unsupported systems to the latest supported platforms. Both hardware and software was already purchased last year for the project. Labor resources were assigned recently to complete this task within the next several months due to the lack of vendor support on the older software when problems occur.

Following the Touchnet upgrade, an alternate to credit card billing will be evaluated by both colleges. EPOS Corporation, which has a history in credit card processing through its Interactive Voice Response systems, has developed a pass-through service to provide hosted credit card processing. EPOS becomes the credit card processor working with its own merchant banks to process the college credit card transactions. The EPOS service requires the college to provide frequent uploads (not real time as we have now) of student account information and allows for download of payment data for import back into the college Banner Student System. This service would replace the credit card processing online as well as at the windows. The advantage is that it also provides the student an 800 number in addition to the online website for credit card payment. EPOS charges a per-charge transaction fee instead of a software licensing or hardware maintenance fee since it is hosted by EPOS. Potential advantages to the EPOS system include: (1) One flat fee for all online & 800# credit card payments made by students (2) provides other methods of payment such as Debit cards and ACH (3) transactions are monitored by the vendor (EPOS) (4) higher security measures (5) billing complaints reconciled by the vendor (6) District access to detailed transactions reports.

6. Web for Faculty

Banner Web for Faculty offers fully-featured online services to faculty and advisors for updating personal and student information, entering grades, viewing course rosters, managing course

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enrollment, and viewing course load and schedule. The District purchased the Web for Faculty module in March 2004. As the District progresses down the path to provide Web services for all the college and district personnel and students, there is a definite need to have this functionality available so that the faculty is not limited in its online capabilities. The faculty will review the Banner module and determine what features benefit them and the appropriate target dates for implementation. The Web for Faculty also provides a replacement for the obsolete grade scanning equipment and establishes the environment to allow the potential usage of Waitlists. Web for Faculty is expected to increase efficiency in data collections and provide faculty with access to rosters via the web, even from home. This module also provides for real time enrollment management data.

7. Third Party Products - SARS, STARS, PE Attendance system, ATI Filer

Banner Academic Services Chairs have placed review of the third party products, SARS, STARS, and ATIFiler, on their priority list to see where services can be consolidated and centralized to reduce costs and improve the systems operation and flow of data for both colleges. Both campuses have completed several release upgrades of the application software and upgrade of the hardware over the past years that are redundant activities. Usage on these systems continues to increase at both colleges so eliminating duplicate efforts would be a labor and costs savings to the District. The current in-house developed attendance system for PE at Chabot will also be included in this review. This could extend in the future to the review of other third party products supporting other groups.

SARS and STARS: Sars-Trak and Stars are software products that track visits to Student Services as well as student contact hours for courses such as labs, learning resources, and tutoring to take attendance in these instructional areas. Sars-Trak has been used by the Chabot campus and operates with a general kiosk in the lab areas, whereas Stars has been used by the LPC campus and operates both with logins at individual computer workstations and in general kiosk mode.

SARS-GRID: Sars-Grid is a third party product that tracks counseling and student scheduling contact hours and is used by both colleges.

ATI FILER: The ATI Filer third party software is used to scan transcripts as well as other hardcopy information collected from students and stores the data for retrieval or update. Both campuses utilize the software. There is a need for a universal system for optical scanning of documents. This would provide a consistent records management program that includes uniform procedures for storage, retrieval, and disposition of records for students, fiscal data, and employee data. The Banner User Chairs will be reviewing other software alternatives for more comprehensive document scanning features to be used district-wide and this may replace ATI Filer in the future. Also, there is an interest to evaluate possible EDI capabilities for automatic transfers of transcripts.

8. Electronic Purchase Requisition

Most departments within the District would like to evaluate Banner's capabilities to do electronic purchase requisitions with online approval to eliminate the manual paperwork utilized today. Additional benefits are that validation of budget funding is done real-time and thus eliminates the need for budget transfers. The Finance and Purchasing groups will need to also review the current business practices and procedures to make modifications where appropriate to adapt to the new online environment. Besides the generation of online requisitions, Banner 6.0 has new features for e-Procurement, which allows interface with external procurement systems such as Corporate Express for budget checking, document validation, and the creation of requisitions or purchase orders. The E-Procurement functions of Banner require the purchase of new SCT

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software, which is the Luminus Foundation portal that already has the external Banner interface built-in.

9. Applicant Tracking

Within the Banner Human Resources module, there are facilities to automate the Applicant Tracking process, which is totally manual at CLPCCD today. Human Resources reviewed the Banner 6 functionality in February 2004, and the flow appears to meet the HR requirements. Human Resources has reviewed other outside products such as Greentree, which is a stand-alone PC based system, and interfaces to the Banner system would need to be built to integrate the two systems. Since the Banner module has comparable functionality, HR is looking seriously at the Banner feature. To support the electronic scanning, storage, and retrieval of applications, Human Resources is interested in evaluating the Banner Document Imaging module, WebXtender, which is integrated with its Applicant Tracking module.

10. Room Scheduling Software - Scheduler 25 or Astra (BOND)

CLPCCD lacks an effective process for assigning and utilizing physical facilities for classes and other events. Third-party products that interface well with Banner are available such as Scheduler 25 and Ad Astra. Information from facility utilization software will provide the Colleges with the information it currently lacks to make critical enrollment management decisions. CLPCCD will form a project team to select, acquire, and implement a room scheduler system. A preliminary review of Scheduler 25 was held in January 2004 in the event that our Bond measure was passed. This session helped the users from the colleges and District understand what functions a room scheduler package could provide to ensure efficient user of the colleges' physical facilities as well as some potential enrollment management benefits.

11. Ad-hoc Reporting & Data Warehousing - possible funding under the Bond

The most frequent need expressed by Banner users is the ability to download data and generate their own reports using an "ad-hoc reporting" product. Users need the capability to manipulate data on their desktop systems using tools with which they have some familiarity. Until the recent Banner 6.0 release, the data structures in Banner made it very difficult to extract data from the system for reporting purposes without the help of the ITS staff. The ITS staff spent extensive weeks and months developing views or tables of the appropriate data that the users required to then setup "on request" parameters for data selection.

With the implementation of Banner 6, the vendor has provided simple views of data within each Banner module that now allows the customers to purchase their own reporting tool to select and extract the data with more ease. This is a significant milestone within the Banner product that now provides a quick solution to the past reporting complaints. The ITS Staff and Banner User Chairs evaluated reporting software tools on functionality, ease of use, and costs and this resulted in a recommendation for district-wide use of Crystal Query/Reporting tool. An initial pilot for the Banner Chairs (2 users per group) will commence at the end of 2004. After the pilot results are validated, additional Crystal licenses will be purchased for more extended usage throughout the District. Completing the "ad-hoc reporting" option would empower users to extract their own data with minimal ITS staff assistance.

A data warehouse allows capturing and preserving data for later reporting and institutional research purposes so that management has access to decision-supporting information. Periodic snapshots at significant points in the academic calendar can be scheduled to automatically occur. Historical comparisons and analysis becomes readily feasible. This project entails the archiving of Banner data on the IBM Enterprise Server, which dates back to data converted in the early 1990's when Banner was installed. The data warehouse capability is a long-term goal

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that would assist in the Enrollment Management activities that the colleges are pursuing for the future. This large-scale project requires at least a six-month design period and an eighteen-month implementation.

12. Student Degree Audit (CAPP)

ITS developed an automatic Student Education Plan (SEP) as part of the Banner System rather than utilizing a stand-alone PC based system without any ties to Banner. This system was developed with the counselors from both colleges to automate all the information that is carried on a manual form. The SEP system contains current or previous educational plans and can create new educational plans for the students. The information consists of educational goals, academic major, referral options, courses by term, and articulation forms for General Ed and transfer requirements.

As a follow-on to the SEP project, CLPCCD will review the Banner system features for Student Degree Audit (CAPP) to see if the functionality satisfies their requirements. The Banner User Chairs plan to visit City College of San Francisco and San Mateo for review of their implementation plan of this feature and determine what issues needed to be resolved. If we proceed with this module, the attributes for courses developed for the SEP could also be used in conjunction with CAPP.

13. Distributed Budget Entry

Finance will review with ITS possible Banner alternatives that could be setup to move closer to a more automated and simpler budget entry process. Features will include spreadsheet capabilities for budget input and analysis. In addition, automatic interfaces with outside vendors like Corporate Express for budget validation will be evaluated.

14. Open Learning Registration for FA

Open learning for financial aid gives us the opportunity to pay students for classes only once they have begun. Currently, we pay students for the term even when their classes have not begun. This is out of compliance and many schools that have not started using open learning are in the same situation (unless they have a home grown solution). SCT has provided us with the ability to do the following:

- (1) Schedule disbursement based on the student's schedule and not the term dates
- (2) Disburse financial aid based on the hours a student is currently attending
- (3) Define a student's date-based period of attendance

It should be noted that Open Learning for Financial Aid could be used separately from Open Learning Registration for Student.

15. Review of Document Imaging Systems (BOND)

CLPCCD requires a district-wide Document Management System that has the capability to scan documents such as student transcripts, employee applications, vendor invoices, and other Finance or Financial Aid documents, and store these documents through an indexing mechanism for retrieval. Due to the large volume of paper that is stored at the colleges and the District Office, this would not only archive documents for easy access or update, but would eliminate wasted building space used for document storage. The Banner System contains such a package called WebXtender that automatically interfaces with Banner directly, which is a significant advantage. However, other vendors such as Hershey offer similar products with

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custom interfaces to Banner. The goal of this project is to provide a district-wide universal system for optical scanning of documents. This would allow for a consistent records management program that includes the uniform procedures for storage, retrieval, and disposition of records for students, employees, and fiscal data.

It should be noted that the ATI FILER system under Third-Party Products (#7) and Applicant Tracking (#9) represent a portion of this project.

16. Banner 6 Academic Standing & Separate Progress Standing

Prior versions of Banner required that the student's academic standing and progress standing be recorded in the same database field. Consequently, the progress standing, which is not normally transcribed, is displayed on all unofficial and official transcripts. Banner now delivers a method of recording the academic and progress standings in separate fields, allowing us to remove the progress standing from the official student transcript that is reviewed by universities and potential employers. The project requires the conversion of our existing combined standings to separate academic and progress standings.

17. Automated student enrollment verification and transcript processing system (revenue generating)

Currently the Colleges utilize the National Student Clearinghouse's core service for loan deferment. The National Student Clearinghouse also provides additional services for Enrollment Verify features for student loan borrowers and Degree Verify features for graduates. The Degree Verify will capture and report data for graduates which is now required and is lacking in CLPCCD's current reporting. Both options contain the added benefit of future revenue generation to offload the burden for outside requests to either provide status information on student financial aid recipients or provide degree verification. Other outside agencies besides the National Student Clearinghouse also provide similar services and will be reviewed as well for comparison of features and benefits.