



**Steering Committee**

Dave Rector, Chair  
 Elizabeth Clark  
 Richard Coughlin  
 Lou Ann Gilchrist  
 Donna Liss  
 Regina Morin  
 Judy Mullins  
 Tammy Roberts

**Integration Team**

Tammy Roberts, Chair & Project Manager	Charisse Hatfield
Nancy Asher	Sally Herleth
Diane Blosovich	Brenda Killen
Angela Carron	David Lusk
Cheryl Cragg	Greg Marshall
Marla Fernandez	Adrien Presley
Michael Garzanelli	Dana Safley
Bethany Gibson	Robin White
Jill Graves	Brittany Harden
Laurie Hall	

**Project Sub-Teams**

A Project Sub-Team will be formed as needed. The memberships will be made up of at least one Integration Team member and other campus personnel with the desired expertise to assist the Sub-Team to complete their specific assignments. In most cases the Sub-Teams will be reviewing, piloting, and/or implementing an assigned application/functionality. Some tasks assigned will have specific guidelines that will need to be followed to ensure consistency and needed details are gathered for setting the timing and priority of implementations.

The Integration Team representative(s) on the Sub-Team will be responsible for ensuring the Project Manager and Integration Team are kept informed of the progress of the Sub-Team. Sub-Teams will come and go throughout the project as needed. A list of the initial Project Sub-Teams, their charge/responsibilities, and their members are provided in Appendix II. The Project Manager will maintain the on-going documentation of the Project Sub-Teams for the duration of the project.

***Roles and Responsibilities***

• **Project Steering Committee/Executive Committee**

The IT governance group, the Information & Applications Steering Committee, will serve as the Project Steering Committee/Executive Committee and provide leadership at the administrative level for the Banner 9 Upgrade. This committee will:

- support the Integration Team
- stay abreast of developments through frequent communication
- make decisions as necessary to ensure that an institutional perspective is maintained throughout the implementation process. This will include making institutional policy decisions as necessary, and in a timely manner to ensure continued progress on the project.
- make decisions regarding requested changes to major systems
- will ensure that appropriate priority is given to the project and its associated parts

• **Integration Team**

## Banner 9 Upgrade Plan Appendix II

The IT governance group, the Administrative Applications Integration Team, will serve as the project management team to provide leadership at the functional level for the Banner 9 Upgrade. They will:

- oversee the upgrade and implementation of all Banner 9 Administrative Pages and Self-Service Applications
- serve as members and/or team leads for Project Sub-Teams identified as part of this project and any Post Banner 9 Upgrade projects established as a result of this project's efforts
- define/update and test user procedures
- validate data
- develop/update policy proposals and procedure manuals
- validate/update end-user training material
- ensure established guidelines are followed for assigned tasks

Additionally, in order to provide as much stability as possible to the project, the team members will remain in place throughout the duration of the project. If necessary or deemed appropriate, staffing of the teams will be adjusted during the project lifespan to ensure the project's success. Project Team member changes will be reviewed and approved by the Steering Committee.

- Project Manager

The Project Manager serves as the Chair of the Integration Team and as an ex-officio member of the Project Steering Committee.

The Project Manager will:

- keep the Steering Committee and the Integration Team informed regarding project progress
- maintain the documentation for the Banner 9 Upgrade project including the Project Sub-Team memberships, the revaluations of the lightweight applications, and the Banner 9 Upgrade Schedule

- Project Sub-Teams

Project Sub-Teams will be established for each Banner Lightweight Application to be implemented, and may also be established for functionality that warrants it. At least one member of the Integration Team will serve on each Project Sub-Team, along with staff from related functional areas with expertise in the functionality being implemented.

The Project Sub-Team lead will keep the Project Manager and Integration Team informed regarding concerns or issues that arise.

The Project Sub-Teams will:

- define/update and test user procedures
- validate data
- develop/update policy proposals and procedure manuals
- validate/update end-user training material
- ensure established guidelines are followed for assigned tasks

## Banner 9 Upgrade Plan Appendix II

### Project Sub-Teams

Project Sub-Teams will be established to complete specific assignments required to complete the overall Banner 9 upgrade. They will be provided with a specific charge/list of responsibilities. The membership will include at least one Integration Team member and campus personnel with the desired expertise to assist the Sub-Team to complete their specific assignments. In most cases the Sub-Teams will be reviewing, piloting, and/or implementing an assigned lightweight application or functionality. The Integration Team representative(s) on the Sub-Team will be responsible for ensuring the Project Manager and Integration Team are kept informed of the progress of the Sub-Team. A current list of the Sub-Teams, their charge/responsibilities, status of their work, and their members are provided below.

#### Faculty Grade Entry Pilot \_\_\_\_\_ Status (COMPLETE)

This application is live.

Faculty Grade Entry and Academic History: Academic History and Faculty Grade Entry lets your faculty enter grades for class assignments as well as post midterm, final, and incomplete grades – all from one location, from any device. Additionally, Faculty Grade Entry provides an updated user interface (UI) for faculty grading including the ability to upload a spreadsheet of grades.

Pilot participants' responsibilities:

- Access the new Banner Faculty Grade Entry (FGE) tool and review your spring courses.
- Grade as many of your courses as you'd like via FGE using the manual grading functionality, the import file process, or a mix of the two processes
- Provide feedback on the FGE tool and any of the features and functionality you have comments of interest
- Review and provide feedback on the user documentation
- \*Complete your spring final grades on time!

Members:

Tammy Roberts  
Adrien Presley  
Maggie Herron  
Ashley Ramsey  
Mark Hatala

Emily Costello  
Ruthie Dare-Halma  
Julia Delancey  
Yuna Ferguson  
Amy Fuller

Chad Mohler  
Jonathan Vieker  
Stacey Kaden  
Barbara Kramer

Summary Results: Responsibilities - COMPLETE. Several members of the team were able to use FGE for their May 2016 grades. Feedback was provided that resulted in some clarification updates to the documentation and the instructions provided. Potential issues identified were documented and were resolved in the spring 2016 release of FGE. With the successful pilot, FGE went live as an option for all faculty grading starting with summer 2016 final grading.

#### Finance Purchase Requisition Review \_\_\_\_\_ Status: (COMPLETE)

Recommendation: Not to proceed at this time

Recommendation accepted and approved by Steering Committee

Finance Purchase Requisition: Finance Purchase Requisition allows faster procurement of products and services with an intuitive user experience and dashboard to help manage requisition processing.

Responsibilities:

- Complete a preliminary review of Finance Purchase Requisition
- Identify benefits of the application
- Identify and document issues or concerns
- Provide a recommendation on implementation

Members:

Angela Carron  
Kim Murphy

Cheryl Cragg  
Beth Oberman

## Banner 9 Upgrade Plan Appendix II

### Registration Review and Pilot Status: (COMPLETE)

Recommendation: Proceed with pilot – pilot being full implementation and all students with the option of using it and to bring live for pilot with base functionality available in Banner 8.

Recommendation accepted and approved by Steering Committee

This application is \*live.

Registration: The Registration application provides four key processes. You can choose to implement any or all of the new functionality.

- Registration Planning: Allows students and advisors to create planned registration schedules. Also integrates with the DegreeWorks Student Educational Plan (SEP).
- Block Registration: Allows students to self-select the block of classes they wish to attend. Admin users no longer have to register students into blocks.
- Projected Registration: Leverages degree audit to generate a projected list of student courses for selection to be used for the next registration term.
- Structured Registration: Students are guided through the selection of classes based on their academic program requirements.

#### Responsibilities:

- Complete a preliminary review of Registration application
- Identify benefits of the application
- Identify and document issues or concerns
- Provide a recommendation on implementation

#### Members:

Maggie Herron (Co-Lead)  
Tammy Roberts (Co-Lead)  
Bethany Gibson  
Kasey Graves  
Brittany Harden

Charisse Hatfield  
Diane Moore  
Melissa Rodman  
Jay Self  
Robin White

\*This application is live with the basic functionality (similar to Banner 8 functionality) as of October 23, 2017. Will implement additional functional in a future phase.

### Student Advising Profile Review and Pilot Status: (Review – COMPLETE; Pilot - IN PLANNING)

Recommendation: Proceed with pilot

Recommendation accepted and approved by Steering Committee

Pilot should begin in spring 2018 semester

Student Advising Profile: Student Advising Profile offers a convenient single view of the most critical information necessary for students and advisors to make better academic decisions. The application also integrates directly with Ellucian DegreeWorks for a complete advising solution.

#### Responsibilities:

- Complete a preliminary review of Student Advising Profile
- Identify benefits of the application
- Identify and document issues or concerns
- Provide a recommendation on implementation

#### Members:

Brittany Harden (Co-Lead)  
Kasey Graves (Co-Lead)  
Kathy Elsea  
Ted Frushour  
Randy Hagerty

Charisse Hatfield  
Adrien Presley  
J.D. Smiser  
Jonathan Vieker

## Banner 9 Upgrade Plan Appendix II

### Direct Deposit Review Status: (COMPLETE)

Recommendation: Not to proceed at this time  
Recommendation accepted and approved by Steering Committee

Direct Deposit: Direct Deposit provides an enhanced user experience to maintain direct deposit information for both employees and students and offers an intuitive future-proof user experience to enter bank account and routing information.

#### Responsibilities:

- Complete a preliminary review of Direct Deposit
- Identify benefits of the application
- Identify and document issues or concerns
- Provide a recommendation on implementation

#### Members:

Michael Garzanelli (Co-Lead)  
Bill Maples (Co-Lead)

Angela Carron  
Beth Oberman

### Attendance Tracking Review Status: (ON HOLD)

On Hold as we determine if this should proceed.

Attendance Tracking: The Attendance Tracking application allows faculty to quickly and easily enter attendance on a mobile phone, tablet, or webpage. Faculty can choose to mark those present or absent, and may also add details on time spent in class.

#### Responsibilities:

- Complete a preliminary review of Attendance Tracking
- Identify benefits of the application
- Identify and document issues or concerns
- Provide a recommendation on implementation

#### Members:

Financial Aid Representatives  
School/Department Representatives

Others TBD

### Employee Profile Review Status: (COMPLETE)

Recommendation: Proceed with pilot  
Recommendation accepted and approved by Steering Committee  
Pilot may begin in spring 2018 semester after federal reporting deadline requirements are met

Employee Profile: The Banner Employee Profile gives employees a consolidated view into their personal employment, and job-related information. It provides a manager with a comprehensive view of their team members with easy and efficient ways to complete the administrative tasks involved with supervising employees.

#### Responsibilities:

- Complete a preliminary review of Employee Profile
- Identify benefits of the application
- Identify and document issues or concerns
- Provide a recommendation on implementation

#### Members:

Sally Herleth (Lead)  
Nancy Asher  
Cheryl Cragg  
John Gardner

Michael Garzenelli  
Bill Maples  
Karl Schneider

## Banner 9 Upgrade Plan Appendix II

### Event Management Review Status: (CANCELLED)

Recommendation: Just not enough content in this application to be worth the team's time so recommend it be cancelled  
Recommendation accepted and approved by Steering Committee

Event management: The Event Management application provides tools to manage an event and its functions as well as enabling event registration in Self-Service. With Event Management, you can monitor event registration, attendance, and participant information.

#### Responsibilities:

- Complete a preliminary review of Event Management
- Identify benefits of the application
- Identify and document issues or concerns
- Provide a recommendation on implementation

#### Members:

Jill Graves (Lead)  
Nancy Asher  
Laura Bates  
Diane Bloskovich  
Marie Delaney

Bethany Gibson  
Brittany Harden  
Beth Oberman  
Brandi Wriedt

### Position Description Review Status: (COMPLETED)

Recommendation: Not to proceed at this time  
Recommendation accepted and approved by Steering Committee

Position Description: With Human Resources Position Description, it becomes much simpler to manage the creation, editing, routing, and approval of position descriptions for key stake holders like hiring managers and human resources staff.

#### Responsibilities:

- Complete a preliminary review of Position Description
- Identify benefits of the application
- Identify and document issues or concerns
- Provide a recommendation on implementation

#### Members:

Arletta Nelson  
Michael Garzanelli  
Sally Herleth

Bill Maples  
Polly Matteson  
DeeDee Moore

### Communication Management Review Status: NOT STARTED

Communication Management: Banner now includes new features that will work across the enterprise. Communication Manager is for transactional connections to your constituents using Banner data, such as financial aid award letters, or messages with reminders to register for classes or notification when tuition is past due. The new functionality in Banner adds another great tool to communicate with specific populations in the overall system.

#### Responsibilities:

- Complete a preliminary review of Communication Management
- Identify benefits of the application
- Identify and document issues or concerns
- Provide a recommendation on implementation

#### Members:

Nancy Asher (Lead)  
Gabe Evans

Marla Fernandez  
Kasey Graves

## Banner 9 Upgrade Plan Appendix II

Charisse Hatfield  
Amanda Shreves  
Heidi Templeton

Stacy Tucker-Potter  
Robin White

## Banner 9 Upgrade Plan Appendix II

Registration – Phase 2: The Registration application base functionality – select and register is live. Now a review of additional features and functionality needs to be conducted, a determination of what should be recommended for implementation, and the next phase of the implementation is completed. This should include integration with DegreeWorks SEP tool for plan based registration and the implementation of block based registration.

### Responsibilities:

- Complete a review of Registration applications additional functionality including block registration and academic plan based registration
- Complete integration with DegreeWorks SEP
- Identify benefits of the application
- Identify and document issues or concerns
- Recommend phase 2 implementation tasks
- Implement approved phase 2 tasks
- Provide information/overview sessions on new features and functionality
- Develop and make available documentation to support the new registration functionality
- Communication to appropriate campus entities what they need to know about the registration phase 2 functionality

### Members:

Charisse Hatfield (Co-Lead)  
Tammy Roberts (Co-Lead)  
Julie Burns  
Brenda Embree  
Bethany Gibson  
Kasey Graves

Brittany Harden  
Beth Oberman  
Melissa Rodman  
Jay Self  
Kim Titus

Student Educational Planner (SEP): The Student Educational Planner is the enhanced planning tool that replaces the currently used DegreeWorks Plan tool. SEP allows drag and drop requirements between terms and is built on templates for easier maintenance and management.

### Responsibilities:

- Complete migration of existing plans to SEP plans
- Review and complete setup requirements for template building
- Ensure CAE and all academic advisors have the tools needed for template building
- Identify and document issues or concerns
- Provide information/overview sessions for advisors on the new features and functionality of SEP
- Develop and make available any needed documentation to support SEP
- Communicate to appropriate campus entities what they need to know about SEP migration/implementation

### Members:

Brittany Harden (Co-Lead)  
Kasey Graves (Co-Lead)  
Kathryn Brammall  
Roberta Donahue  
Billi Gordy

Charisse Hatfield  
Jack Holcomb  
Beth Oberman  
Tammy Roberts  
Tim Walston



## Banner 9 Upgrade Plan Appendix II