



# **Idaho State University**

## **Banner ERP Implementation Project**

### **Update**

*Leading  
in Opportunity  
and Innovation*



# 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?*

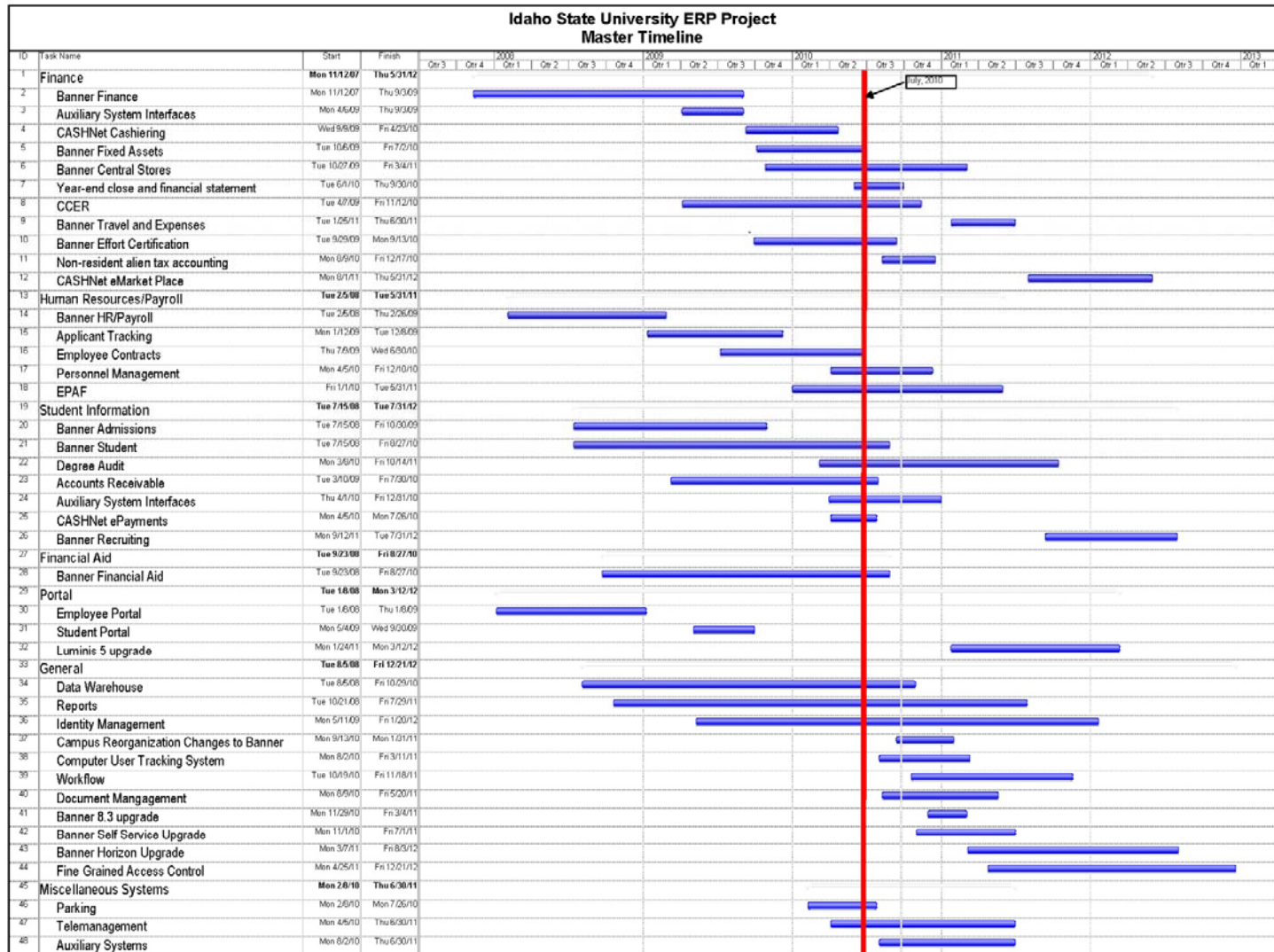
- Workflow
- Document Imaging
- Modernized User Interface
- Many Modules in Functional Areas



**IDAHO  
STATE  
UNIVERSITY**

*Leading  
in Opportunity  
and Innovation*

# Banner ERP Update





# BengalWeb Update

---

BengalWeb

Blake Beck  
Portal Team Lead

*Leading  
in Opportunity  
and Innovation*



# 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
  - Web Time Entry Dec. 2008
- Student Portal Launch Oct. 2009
  - Student Enrollments through BengalWeb April 2010
- First Semester Fully Online Fall 2010



# BengalWeb Update

---

## Major Accomplishments by Committee

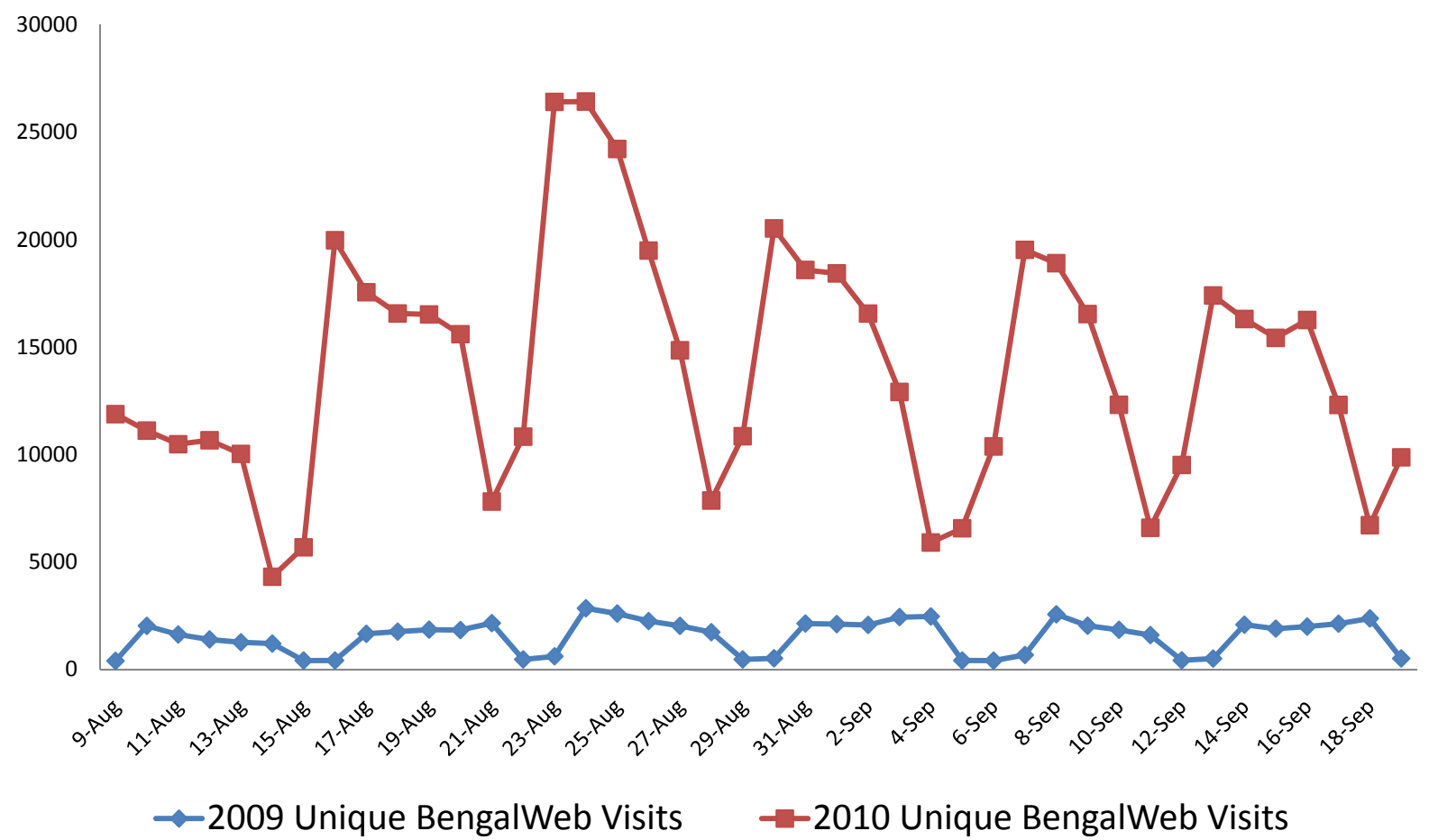
- Training with SunGard Consultants
- Decisions about Content
- Decisions about Organization
- Hours of Discussion and Consideration of Functionality/Features within BengalWeb
- Usability Studies of BengalWeb with Employees and Students
- Multiple Successful Launches of Portal(s)



Leading  
in Opportunity  
and Innovation

# BengalWeb Update

## BengalWeb Usage





# 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

*Leading  
in Opportunity  
and Innovation*



# 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



# HR/Payroll Update

---

## 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

*Leading  
in Opportunity  
and Innovation*



# 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
  - Grant reporting that encompasses Multi-Year Grants.
  - Detail on Accounts Receivable paid through Cashiers Office
  - Enhanced Reporting of the Accounting Activity Report



# Financial Aid Update

---

Kent Larson, Director of Financial Aid  
Jody Finnegan, 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

*Leading  
in Opportunity  
and Innovation*



# 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

*Leading  
in Opportunity  
and Innovation*



# 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
- *Tigeri* 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..



# Reporting Update

---

## 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.



# Reporting Update

---

## 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!***