

Banner Implementation Project

Status Report

for February 2001 through April 2001



Project Overview

Please visit the Georgia State Banner Implementation Project web site at www.gsu.edu/banner to learn more about this project.

Overall Accomplishments and Activities

- In early February, University Provost Ron Henry announced that there would be a change in the Banner project leadership. Bill Fritz was named as Banner Project Leader, and Cherise Peters was named as Associate Banner Project Leader.
- Over the last 3 months, the Banner Implementation Team, with input from the Colleges and the administrative offices, has continued to revise the project timeline, which shows the proposed 'go live' dates for the various Banner modules. The current project timeline is available at www.gsu.edu/~wwwban/currentnews.html.
- Bill Fritz and Cherise Peters have met with various University focus groups to discuss the Banner project. Setting realistic expectations for the project after Banner initially goes live, and discussing expected benefits, features, and capabilities of GA State's Banner implementation have been the primary objectives of these meetings.
- The Banner Implementation Team and selected project technical resources attended SCT's Banner User Conference, also known as SCT Summit, in Toronto, Canada during April 8-11. Attendees were able to attend various sessions and learn from the experiences of their colleagues from other colleges and universities who have or are in the process of implementing Banner.
- The Banner Implementation Team participated in a 2-day Leadership Development retreat facilitated by Cornelius & Associates during April 19-20. Future Leadership Develop retreats for the Banner Implementation Team will be scheduled on a quarterly basis.
- The Banner training/development environment was migrated from the 4.3 release of Banner to the 5.0 baseline release in April. The 5.X GA mods release should be delivered to GA State by the BOR/OIIT group in early June. We will then migrate from the 5.0 baseline release of Banner to the 5.X GA mods release.
- Starting on May 1, we will have a full-time SCT Student consultant assigned to the GA State Banner Implementation project. The consultant's name is Karen Chastonay. Karen will be on-site at GA State Tuesday through Thursday of every week, working out of the Banner Project Office in Suite 540 of Ten Park Place. On Mondays and Fridays Karen will be working from home and will be available by phone.
- We continue to make improvements and add additional useful information to our project web site, which is available for anyone to view. If you are interested in learning more about this important project, go to www.gsu.edu/banner.

Academic History Team – Team Leader: Dan Hammond

- The Academic History Team, along with selected others, participated in a training session April 2-4, which covered end-of-term processing, academic history, graduation, and transfer articulation. This training was provided by SCT Student consultant, Cathy Knapp. Additional topics covered included grades and grading issues, GPA's, academic standing, transcript production, and academic history reports.
- A review week for this team will be scheduled with our new Student consultant, Karen Chastonay.

Advising/Degree Audit Team – Team Leader: Tim Woltering

- The Advising/Degree Audit Team evaluated and compared several advising/auditing products, including the Banner CAPP module, DARS, and DegreeWorks. Many of the features of DegreeWorks, including its web-based access and flexibility in format, made it the front-runner among the products evaluated. A major concern with DegreeWorks is that it did not include an interface with Banner. If DegreeWorks was selected, GA State would be the first time that DegreeWorks had ever been interfaced with Banner.

Banner Implementation Project

Status Report

for February 2001 through April 2001



- After many discussions with faculty and staff across the University about their advising and auditing needs, the Team decided to recommend that the University's existing advising/audit system, PACE, be rewritten into an environment that was compatible with Banner. Rewriting PACE, instead of purchasing another product, will allow us to save degree requirements that are already encoded, allow us to retain control of our auditing/advising system, and allow us to preserve and further develop a good system that already meets most of our needs.
- The PACE rewrite project is expected to be completed by the end of 2001, and the goal is to begin using the new PACE system in April of 2002.

Catalog/Scheduling Team – Team Leaders: Dan Hammond and Carolyn Alexander

- After receiving their initial training on the Banner Catalog and Schedule modules by SCT Student consultant Sandra Beaulac in January, the team participated in a review session for these modules during February 5-8. Additional training with the new SCT Student consultant, Karen Chastonay, will be scheduled in the future.
- An exercise, which involved the use of realistic GA State data and the use of several Banner modules was planned and carried out. Students from our legacy system were identified based on the variety of courses they had on their legacy record. These students were created in Banner by the Admissions team and their courses for the previous four terms were created in Banner by the Catalog/Scheduling team. The Registration module was used to register the students for these courses, and then the Academic History module was used to move this information to history.
- The Catalog/Scheduling Team's project plan was developed, reviewed with the Team, and approved. Tasks have been identified and resources have been assigned. Currently the Team is creating the various validation and rule form entries for the Catalog module.
- Jonette Gowan and her staff have provided much assistance by converting most of the legacy system catalog data into Banner, including the conversion of the legacy course descriptions for catalog by pulling the data from PageMaker. The team is currently reviewing the results of this conversion. By converting the catalog data from OASIS to Banner, significant savings in data entry time should be realized.

Financial Aid Team – Team Leader: Dave Bledsoe

- The Financial Aid Team is progressing on schedule with their implementation.
- The majority of the Financial Aid modules have been training on, with just a few modules remaining.
- The Team is focusing on building, reviewing, and testing their validation and rule tables.
- The Team is reviewing their current operating procedures to determine how they will need to be changed to reflect how they will be using Banner.

General Person Team – Team Leader: Dan Hammond

- Data entry standards, which were initially developed 5 years ago during the GA State Summit project, have been reviewed and updated. A new draft is being finalized for review and approval.
- Mark Mayfield and his staff have been able to convert much of the General Person data (basic name and address information) from the legacy system into Banner. This has been reviewed. The biggest problem area is with international addresses. A massive cleanup of international addresses in the legacy system will need to be completed prior to the final conversion into Banner.

Location Management Team – Team Leader: Dan Hammond

- Training for the Location Management Team began in late January. Location Management involves defining the University's buildings and rooms, which is necessary when assigning rooms during class scheduling. Housing is also included in the Location Management module.

Banner Implementation Project

Status Report

for February 2001 through April 2001



- Unfortunately the representative to the Team from the Housing office resigned from the University and a replacement has had to be named.
- Additional training for the Location Management module with the new SCT Student consultant, Karen Chastonay, will need to be scheduled.

Registration Team – Team Leader: Dan Hammond

- The Registration Team, along with others from the Catalog/Scheduling Team and the Academic History Team, participated in training on the Registration module from Feb 26 – March 1. Registration training was provided by SCT Student consultant Cathy Knapp. Topics covered during this training included various aspects of parts of term, enrollment and course registration statuses, and the registration control forms set-up that is required each semester. A brief overview of fee assessment was given, with the understanding that it would be covered in more detail during A/R training.
- A four-day review session for the Registration module was held from March 19-22. Additional practice and testing was done during this session, and there was a review of the validation and rule forms.
- Additional training for the Registration module with the new SCT Student consultant, Karen Chastonay, will need to be scheduled.
- Several 'cross-team' issues have been raised between the Registration, Catalog/Scheduling, and Academic History Teams. Joint team meetings are occurring to deal with these issues.

Reporting Team – Team Leader: Mike Moore

- A new machine and operating environment for STATWARE and the data warehouse have been established. STATWARE and the data warehouse have been moved to this new environment.
- A two-year statement of resource requirements has been developed. The assignment of 1.5 EFT from IS & T, and .5 EFT from the RCB have been added to the project.
- Office space has been found in 519 One Park Place South.
- Currently working to establish a funded operating budget.
- Currently working to determine Banner reporting requirements/functionality.
- Establishing reporting priorities and an action plan for development of reporting.
- Continue working to establish Decision Support as a functioning entity.

Student Accounts Team – Team Leader: Joann Worthington

- The Student Accounts Team participated in Accounts Receivable module training during March 19-22. The Team was not satisfied with the level of understanding that the SCT Accounts Receivable consultant demonstrated, so a decision was made to have SCT replace her with a more knowledgeable consultant.
- SCT has assigned a new Accounts Receivable consultant to the GA State project. Her name is Candace Boehlke. The Student Accounts Team will be retrained in the Accounts Receivable module during Candace's first visit to GA State during May 7-10.
- A demonstration of the CORE Point-of-Sale cashiering system has been scheduled for May 22. Also participating in this demo will be representatives from Georgia Tech and Georgia Southern. The demonstration will be held at Georgia Tech.

Transfer Articulation Team – Team Leader: Tim Woltering

- Currently working on validation and rule tables. Validation tables that include a description and grade table for each transfer institution will be completed by mid-June.
- Jonette Gowan and her staff are working with the Transfer Articulation Team to convert the University's transfer equivalency table into Banner. A test conversion of the Georgia Perimeter College's courses has been

Banner Implementation Project

Status Report

for February 2001 through April 2001



successful and the next step will be to convert all other school's courses, followed by a review and clean-up of the converted data.

- Current target date for using the Banner Transfer Articulation module is January 2002.

Undergraduate and Graduate Admissions Teams – Team Leader: Dan Niccum

- The Recruiting and Admissions project plan has been completed and approved. We are currently monitoring progress against the plan.
- The following activities have been completed or are nearing completion:
 - Current procedures have been documented to the lowest levels
 - Samples of current legacy system reports and data entry forms have been collected
 - Training materials have been reviewed and training exercises have been completed
- 84 validation and rule forms have been assigned and are being worked on
- The timeline for going live with the Banner Admissions module has been revised as follows:
 - Starting in late January 2002, transient and post-baccalaureate applications for the Fall '02 semester will be entered in Banner.
 - A select group of freshman applications for Fall '02 may also be entered into Banner starting in late January 2002.
 - All other freshman and transfer applications for Fall '02 will continue to be entered in OASIS through the end of April 2002.
 - All undergraduate applications for Spring '03 (and beyond) will be entered in Banner beginning in late January 2002.
 - At the end of April 2002, OASIS will no longer be available for processing Fall '02 applications. From this point forward, all Graduate and Undergraduate Admissions data entry and processing for Fall '02 applicants will be done in Banner.
 - Members of the Graduate Admissions Team have been asked to review this timeline with their colleges and provide the Implementation Team with their individual college's timeline and plan for using Banner for their Fall '02 (and beyond) application processing.
 - In early May 2002, the conversion of OASIS admissions data into Banner will take place. It has been decided that admissions records for all active and inactive students will be converted. Admissions records for all other applicants will be converted only back to Summer 2000.
- For undergraduate admissions, the following decisions have been made regarding the use of Banner and the Sequitur recruitment software package:
 - There will be a one-way Banner to Sequitur interface only (no interface from Sequitur to Banner). All undergraduate recruitment data will be maintained in Sequitur. Data elements to be mapped include: first name, middle name, last name, suffix, mailing address, social security number, gender, date of birth, ethnicity, entry term, decision, high school, college, status, student type, and admit type.
 - All applications will be entered into Banner. The Sequitur record will be created/updated by the Banner feed. It will be presumed that Banner data is the most recent/accurate data and thus will override the Sequitur data.
 - SAT/ACT scores will be loaded into both Sequitur and Banner. In Banner, however, only when a SAAADMS record exists will the test score information be captured. Otherwise, create an electronic suspense file and run a weekly process to match scores with applicants (this replicates the current process in OASIS).
 - Student search records will be loaded only into Sequitur.
 - Any vendor (e.g. test scores, Search, etc) import into Sequitur will not "activate" the new address when a record already exists in Sequitur.
- For Graduate Admissions, it appears that the implementation of the Banner Recruiting module will be postponed until after the full implementation of the Admissions module.

Banner Implementation Project

Status Report

for February 2001 through April 2001



• **Upcoming Activities:**

Week of 4/30/01		
• Financial Aid training with Financial Aid consultant Norma Shipp	405 Classroom South	4/30 – 5/3 9 am – 4 pm
• First week for new Student consultant, Karen Chastonay	Banner Project Office, 540 Ten Park Place	5/1 – 5/3 7:30 am – 3:30 pm
• Karen Chastonay available by phone from home (see Cherise or Wanda for phone number)	Home	5/4 available hours TBD
• Banner Implementation Team meeting	Conference Room, 10 th floor of One Park Place	5/4 11:00 am – 1:00 pm
Week of 5/7/01		
• Accounts Receivable training with Accounts Receivable consultant Candace Boehlke	405 Classroom South	5/7 1:00 pm – 5:00 pm 5/8-9 9:00 am – 5:00 pm 5/10 9:00 am – 1:00 pm
• Karen Chastonay available by phone from home (see Cherise or Wanda for phone number)	Home	5/7 available hours TBD
• Student consultant, Karen Chastonay	Banner Project Office, 540 Ten Park Place	5/8 – 5/10 7:30 am – 3:30 pm
• Karen Chastonay available by phone from home (see Cherise or Wanda for phone number)	Home	5/11 available hours TBD
Week of 5/14/01		
• Karen Chastonay available by phone from home (see Cherise or Wanda for phone number)	Home	5/14 available hours TBD
• Student consultant, Karen Chastonay	Banner Project Office, 540 Ten Park Place	5/15 – 5/17 7:30 am – 3:30 pm
• Location Management training (see Dan Hammond for details)	Banner Project Office, 540 Ten Park Place	5/16 1:00 pm – 3:00 pm
• Karen Chastonay available by phone from home (see Cherise or Wanda for phone number)	Home	5/18 available hours TBD
• Banner Implementation Team meeting	Conference Room, 10 th floor of One Park Place	5/18 11:00 am – 1:00 pm
Week of 5/21/01		
• Karen Chastonay available by phone from home (see Cherise or Wanda for phone number)	Home	5/21 available hours TBD
• Banner Key Dependency meeting	Conference Room, 10 th floor of One Park Place	5/21 11:00 am – 1:00 pm
• CORE Point-of-Sale cashiering system demonstration at GA Tech (see Joann Worthington for details)	GA Tech	5/22
• Student consultant, Karen Chastonay	Banner Project Office, 540 Ten Park Place	5/22 – 5/24 7:30 am – 3:30 pm
• Karen Chastonay available by phone from home (see Cherise or Wanda for phone number)	Home	5/25 available hours TBD

Continued on the next page...

Banner Implementation Project Status Report for February 2001 through April 2001



Week of 5/28/01		
• Memorial Day Holiday		5/28 ALL DAY
• Student consultant, Karen Chastonay	Banner Project Office, 540 Ten Park Place	5/29 – 5/31 7:30 am – 3:30 pm
• Registration review (see Dan Hammond for details)	405 Classroom South	5/29 9:00 am – 3:30 pm
• Academic History review (see Dan Hammond for details)	405 Classroom South	5/30 9:00 am – 3:30 pm
• Karen Chastonay available by phone from home (see Cherise or Wanda for phone number)	Home	6/1 available hours TBD
• Banner Implementation Team meeting	Conference Room, 10 th floor of One Park Place	6/1 11:00 am – 1:00 pm

To contact the Banner Project Office:

Address: Ten Park Place, Suite 540, Atlanta, GA 30303
Phone: (404) 463-3710
Fax: (404) 463-3702
Email: banner@gsu.edu
Web: www.gsu.edu/banner