The Banner Finance Module is tasked with the oversight of the finance side of the Banner system and works closely with the Budget, Research Accounting, Purchasing Modules and the finance side of payroll. The Module’s goals are: 1. to efficiently and effectively utilize the Banner system and all third-party applications implemented by the South Dakota Board of Regents; 2. to automate processes in order to reduce manual effort, thus decreasing the potential for error; 3. to implement procedures to facilitate consistency across the system in reporting, documentation and daily processes; and 4. to communicate federal, state, and local policies and subsequent changes that directly effects the financial management of the institution including Banner procedures, GASB statements, NACUBO guidelines and communications, BFM directives, and IRS rules.

Current members of the Finance Module include the controllers and business office staff from each university, the special schools, RIS, and the board office. Members include: Rob Houdek, Amy Dockendorf, Kay Fredrick, Heather Forney, Deb Rowe, Dawn Miller, Karen Jastram, Janet Peterson, Jim Rogness, Kim Yunginger, Shelley Brunick, Melissa Hartnett, Claudean Hluchy, Nancy McKenzie, Dennis Konkler, Michelle Elkin, Scott Van Den Hemel, Sherri Stahl, Sara Brainard, and Justin Nagel.

The first Monday of every month is the regularly scheduled conference call. Static agenda items include the Banner and the State’s Central Accounting System (CAS) finance calendar highlights for the current month as well as the next month, pending items from prior conference calls, and specific processes that occur during that particular month. The module calls also provide an opportunity for members to bring forward initiatives for efficiencies and better business practices.

Cognos User Group To Be Developed

Many of the universities have created independent Cognos work groups to expand their internal reporting opportunities. To further leverage the training workshops hosted by the SDBOR and also provide a forum for the university work groups to collaborate, the SDBOR is in the process of forming a Cognos User Group. This group will be comprised of members from all types of business intelligence-related disciplines who share common interests in sharing information and reporting techniques. Anyone from technical to end-users are welcome and encouraged to participate. All meetings will be held online for approximately 45 minutes and will offer focus topics, review of reporting techniques in Cognos, and discussions of best practices.

More information regarding the kick-off Cognos User Group meeting will be available after the first of the year.
The **Banner Technology Committee** continues to plan for Ellucian Extensibility (aka XE or 9.x) for Banner. With the delivery of the Banner XE version, Ellucian has modernized their application software, including migrating from Oracle Forms to HTML5/Java based pages. The Banner XE changes are specifically targeted to transform the user experience, accessibility and extensibility for Banner. The advantage of extensibility is to allow Banner clients to manage their Banner solution to meet the unique requirements of the institution without modifying the system or its underlying source code. With the Banner XE version, Ellucian utilizes Groovy and Grails for the development of all Banner Restful APIs and Banner 9.x self-service applications. Groovy, as a meta programming language for Java, and Grails, as a web application framework for development. The Banner 9.x administrative applications will include extensibility tools that fully support Ellucian’s XE strategy. Banner clients will be able to maintain their custom transformed pages through the use of these new applications that support the new transformation architecture.

RIS staff has attend Ellucian technical planning workshops for hardware and system software needs for Banner XE and are on track with its needs. Starting the first part of the new year, RIS will be working to migrate Banner to new hardware along with upgrading AIX. RIS has also been working through planning for the deployment of the various Banner XE application modules. No timelines for implementation of Banner XE have been identified yet. Functional and technical training for Banner XE will be necessary due to the changes to the user experience and technical architecture.

Several campus staff attended **Cognos** training in Pierre December 13-15, 2016. (photo provided by Mary Ellen Garrett)
Current Projects

The next quarterly conference call for the Fixed Asset Group will be January 18, 2017 at 2PM CST. The group will review progress with entering equipment in BANNER and any “trouble assets”. They will also review the quarterly depreciation report that was run in Audit Mode at the end of the quarter to determine if there are any problems.

The Business Affairs Council (BAC) recently approved a request from the Purchasing Module Group to remove office supplies (commodity code 58500) and cleaning supplies (commodity code 17750) from Shared Services. In both cases, the majority of items purchased are available on contract and the average purchase order dollar amount is relatively small. Another factor is that campuses have their own standards for cleaning supplies, therefore, combining orders is not feasible. The Purchasing Group felt these supplies could be handled by each campus more efficiently. The work flow in SDezBuy will be changed soon so these orders will remain at the campus level for processing.

Also, a sub-committee of the Purchasing Module Group is working on a survey regarding our recent change with commodity code mapping. We expect the survey to be available in January. Another sub-committee is evaluating the purchasing assessment fee process to determine if there is a better method to identify orders subject to the fee. A third sub-committee is researching the SDezBuy Forms application to determine if an electronic W9 form could be developed. The Purchasing Module Group’s next meeting is January 18, 2017.

Updates on Past Projects

The monthly Finance and Administration Newsletters can be found on the Board of Regents website at https://www.sdbor.edu/administrative-offices/finance-administration/Pages/2016-Finance-and-Administration-Newsletters.aspx.

Accomplishments

Congratulations to Joann Pomplun, NSU, on her retirement. For over 40 years, Joann’s dedication and support of NSU and the BOR system contributed to the success of many projects. She will be truly missed.