

SOUTH DAKOTA BOARD OF REGENTS

Academic and Student Affairs

AGENDA ITEM: 5 – E
DATE: August 7-8, 2019

SUBJECT

Banner Implementation Update

CONTROLLING STATUTE, RULE, OR POLICY

[BOR Policy 1:1](#) – General Authority, Powers, and Purpose of the Board ¹
[BOR Policy 1:7:6](#) – Technology and Telecommunications Council ²

BACKGROUND / DISCUSSION

In 2017, the Board of Regents approved both a Banner Version Upgrade for HR and Finance and a Banner Student and Financial Aid Implementation. Our last BOR item was in October 2018. Over the past several months regular Council meeting (Academic Affairs, Technology Affairs), Steering Committee meetings, and Campus Project Manager meeting updates were held. In addition, email communications were provided weekly as a means to update the teams working closely with this project.

IMPACT AND RECOMMENDATIONS

SISFA – Student Information System and Financial Aid Implementation.

The timeline commitments for implementing SISFA include:

COMPLETED General Person	October 15, 2018
COMPLETED FA New Year Roll Deployment	October 22, 2018
COMPLETED FA Applications Deployment	November 5, 2018
COMPLETED General Student Deployment	December 17, 2018
COMPLETED Application Phase I Deployment	January 17-23, 2019
COMPLETED Admissions/Overalls Deployment	January 21-25, 2019
COMPLETED Financial Aid Awarding Deploy	February 11, 2019
COMPLETED Other General Student Migration	March 5, 2019
COMPLETED Summer/Fall Registration Deploy	March 18, 2019
COMPLETED Accounts Receivable Deployment	May 10, 2019
COMPLETED FA Disbursements/COD Orig.	May 10, 2019

¹ Policy 1:1 outlines the constitutional authority the Board of Regents has to govern the University system. This governance includes full power, responsibility, and authority to supervise, coordinate, manage and regulate.

² Policy 1:7:6 outlines the goal to incorporate technology systems as outlined by the Board of Regents.

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INFORMATIONAL ITEM

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COMPLETED Academic History Deployment	May 15-31, 2019
COMPLETED Mobile Application Deployed	May 31, 2019
CRM Application Deployment TBD by Campus	August 31, 2019
DegreeWorks Degree Audit Deployment	October 7, 2019
DegreeWorks Student Planner Deployment	January 2020

As noted in the timeline above, all major aspects of this system are now live. Financial Aid was the forerunner with their October 2018 go-live date, shortly followed by Admissions January 2019, General Student March 2019, Accounts Receivable and Academic Records (both May 2019). As of this date July 29, 2019 we have processed over 600 transcripts from Banner (this feature and functionality of the system went live on July 22, 2019).

The additional three items that remain for go-live are part of add-ons to the Banner Baseline. The Recruitment software (CRM) is campus specific and determined by Campus needs. The timeline for those campus systems are as follows:

BHSU	Undergraduate Scheduled August 2019; Graduate In Progress TBD.
DSU	Undergraduate/Graduate CRM Scheduled July 2019.
NSU	Undergraduate CRM Scheduled August 2019; Graduate Scheduled 2020.
SDSMT	Undergraduate/Graduate Live CRM.
SDSU	Undergraduate/Graduate Live CRM.
USD	Undergraduate CRM Scheduled August 2019; Graduate Live CRM.

The DegreeWorks software is scheduled to be initiated in a two-part phase. The audit software will go-live with the Registration cycle in October allowing advisors and faculty to work with students for their registration/course needs. Then Student Planner functionality will go-live in January with the newest software version allowing student to maximize the newest features provided.

Project Close-Out

Given that the majority of the milestones are completed for the implementation, this project as it relates to consulting services has started to close out. The project leadership (Steering Committee) did discuss next steps as it relates to on-going maintenance and additional work to meet SD needs. Part of the next phase will be to utilize the Ellucian Action Line rather than the implementation consultants. Regents Information Systems is in the process to create documentation on support roles for Action Line cases. The monitoring of those Action Line cases will also be part of these procedures. As the implementation closes out, the team will start migrating to the Maintenance Phase.

Maintenance Phase

With the implementation phase closing out, the focus has now started to shift in understanding the interplay between modules, the reports/edits necessary and documentation of rules, procedures, etc. Therefore, additional resource and effort will

include training, integration, scripts/processes (automation), workflow, etc. This next phase concentrates then on ensuring that the implementation has met the stakeholder needs and if not augment the system processing to meet the needs. In any software cycle, this next maintenance phase is critical for continued success.

As we now reside in an Enterprise Resource Planning System (ERP) all module teams now must work together to ensure proper reporting, workflow and services are best equipped to meet the stakeholder needs (i.e., employee, student, vendor, lender, etc.).

Project Status

Overall the student information system project has remained within the project scope in totality with minimal modification. With that said, there has been a finite number of SDBOR system modifications requested and approved through the Project Management guidelines.

Of the system requests, the approved changes with some impact to project scope and budget include:

- Veteran Information
- Accounts Receivable Cash Distribution
- Data Migration of the In-Flight Applications
- Change Request Additional Consulting Hours – Functional/Data Migration/Project Management Services (This includes 1098T hours)
- Ethos Integration Services

Summary

There is much credit to be given to the teams that were assigned to this project. It required time, effort, resources and dedication to get to where the system is as of today. The BOR project team wants to impart a *sincere thank you* to the countless hours that this team dedicated with diligence and to the campus leadership for guiding their teams during this implementation. The project team also extends a thank you to the Ellucian consultants and project leadership for their continued support and effort in this project.

As stated above, this project will begin to close out of the implementation/execution of the project and move toward the maintenance phase. The team effort will continue; however, the teams will now begin to focus on such areas as reporting, integration, enhanced functionality, modifying configuration to better meet the needs of the universities, documentation, training, scheduling of Banner processes, etc.

ATTACHMENTS

None