



# **All Hands Meeting & Reg. Go Live Celebration!!!**

*Friday, May 9<sup>th</sup>*



# Agenda

- Welcome Indra Bishop 3:15
- REG Team Recognition Chris Wessells and Dr. Tom Herrinton 3:25
- REG Go Live Experience Sue Bugbee/Marge Zhou 3:40
- What's left for Reg Team? Beth Lacy 3:50
- Xtender/Imaging Update Ray McCormack 4:00
- BSAR Update Rosemary Stallbaumer 4:15
- Instance Management/Change Mgmt Andrew Maller/Chris Palmer 4:30
- A peek at Banner 8 Chris Rapp 4:50
- Message from Provost Dr. Sullivan 5:00
- Dup Id Process Steffanie Hoie 5:15





# Other accomplishments

- Banner/Luminis Integration
- Admitted Tab
- New Student Tab
- Xtender Upgrade
- Xtender/Luminis Integration
- ODS/Cognos Report – over 20 reports completed
- Financial Aid New Student Packaging
- Continuing Student Packaging
- DARS
- HR/Banner Interface
- New Luminis Channels – Holds)
- Catalog Search
- Faculty Self Service
- Lots of Training



# Our Strengths

- The collaborative effort between functional and technical areas.
- Strong participation from functional areas – they took ownership of their processes.
- Smaller teams – quick decisions, autonomy and less bureaucracy or bottlenecks.
- Right Resources brought in Right Time (Funding)
- Good Synergy built
- Get it done attitude.



# Our Challenges

- Fairly broad Scope. We put in a LOT of new technology.
- Not too much ERP experience within team.
- Some resistance to change.
- Some tendency to find solution before defining problem.
- Not always enough time for documentation



# What's Next???



# Over-arching ERP Challenge: Achieving Organizational Understanding:

- The biggest ERP challenge faced by organizations is recognizing that their world has changed forever.
- Integration of previously un-integrated job functions requires that knowledge workers supporting different organizational functions will now be using the same software and they will both be entering information that affects the other.
- To do this accurately, these knowledge workers must have a much broader understanding of how others in the organization perform their functions than they did before the ERP solution.

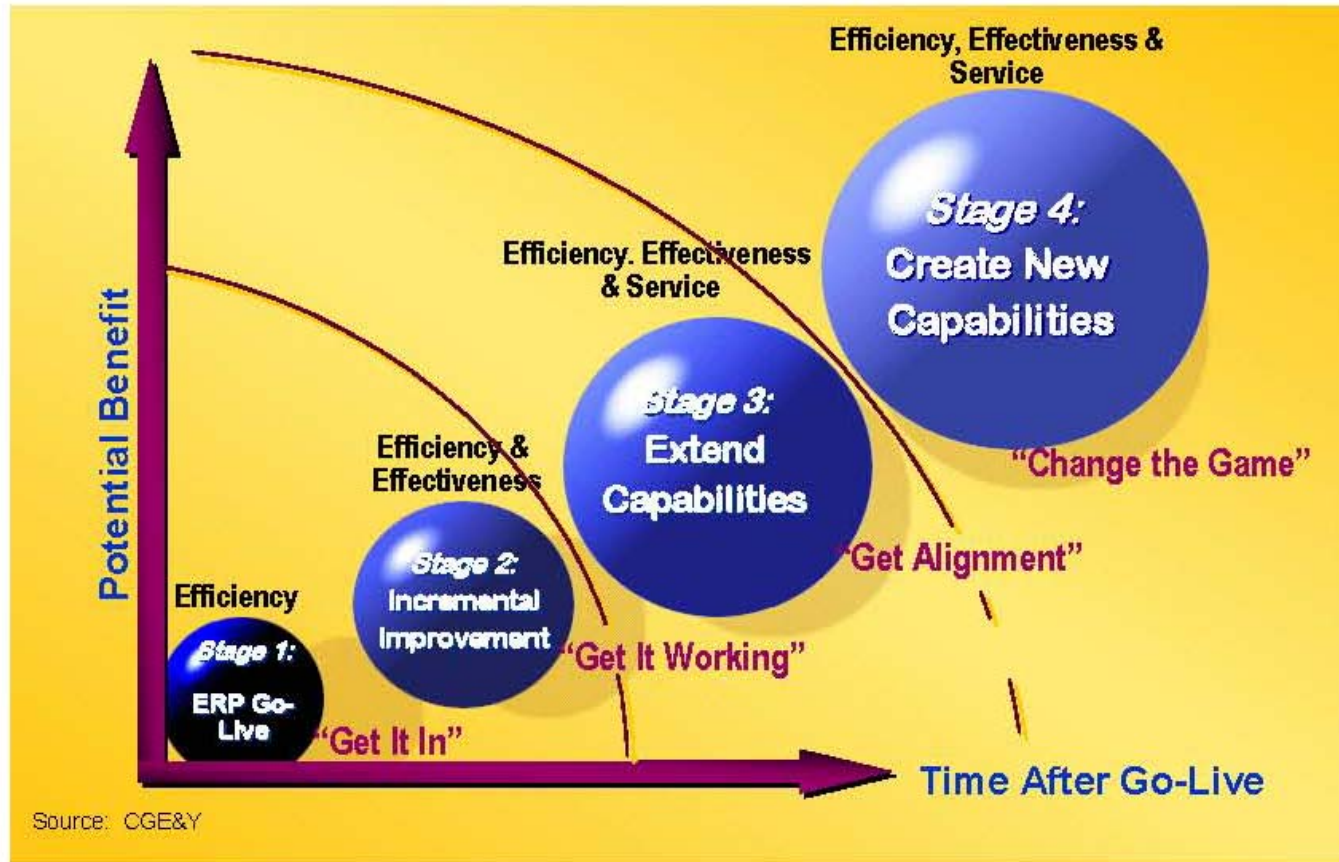


# *Implementation teams can never stop*

– After ERP, you can't go home again –



# Lifecycle of ERP Benefits



# Looking Ahead

- Enrollment Management – CRM
- WebCt Integration
- Spring class offerings
- Clqass Rosters
- DARS interface both ways
- Training Offerings
- Faculty Advisor Hold Design
- Data Clean up
- Rest of acadamic History Load
  
- International Students Wishlist
- Portal for prospective Students
- Automation – Workflows
- Surveys
- Waitlists
- Faculty Loads
- Continuing Ed
- Alumni Portal – tighter Integration
- Studio Abroad
  
- Upgrade to Version 8
  - Start planning 3rd quarter of 2009



# Night of Go Live

- Things we wish we had...
- Things we wish we will not have to use
- Things that will always bring special memories of a special night

# Registrar Office

- Lisa Zullo
- Craig Murken
- Maria Estrada
- Charlene Hernandez
- Teresa Baker-Evans
- Ching-Fang Tu
- Michelle Poveda
- Kim Cam
- Orlando Menezes
- Marvin Veneracion
- Ruey Shivers
- Tiffany Nakamura
- Kim Parks
- Arts & Sciences - Anne Sturz
- Health Center - Maureen Kane
- R-25 group - led by Larry Gardepie and Jerry Singleton
- Area Schedulers



# IT Resources

- Beth Lacy
- Chris Rapp
- Matthew Hejazzi
- Steve Taburiaux
- Zahra Khalili
- Dan Nichols
- Andrew Maller
- Ray McCormack
- Pam Caldwell
- Czen Balagtas
- Matt Brennan
- David Vesey
- Tina Wing and Staff
- Ray Rodriguez
- Sal Rodriguez
- Charlie Kohler
- Chris Palmer
- Shiva A.
- Ken Wilford
- Shawn Strande
- Suhas Jakkaraju
- Gary Rao
- Matt Batchelder
- Danny Crinion
- Kushan Hewa



# Registrar Office

- Extra-special bear awards should go to:
- Lisa Zullo, ChingFang Tu, Charlene Hernandez, Czen Balagtas, Alison Do, Marvin Veneracion who assisted daily with the Registration helpline, fielding calls and registering students.
- And of course, Beth Lacy, Chris Palmer and Andrew Maller!



# Law School

- Jocelyn Shinagawa
- Erik Kim-Holmgren
- Linda "Pat" Quinn
- Mychal Odom
- Tami Marsch
- Darlene Smith
- Law scheduling-Kit Brawner



# Beth Lacy

## What's left for Reg. Team?



# Registrar – Going Forward

- Data Clean up
- Conversion of Remaining data
- Future Integration
- End of Term Processing Grading
- Reports
- Fine Grain Access

# Data Cleanup

- Interface improvements
  - DARS Course titles/trailing spaces
- Enhancements
  - Math090
  - Honor Students
- Conversion Corrections
  - Fall 07 missing data
  - Missing Student Records

# Data Cleanup

- Complete Data Cleansing
  - Data inconsistencies
  - Exact Data matches
  - Error messages

# Conversion of Remaining Data

- Grades for remaining terms
- Current Students
- Non Current Students



# Remaining Processes

- End of term Processing
  - Grading/Grade Roll
  - Academic Standing
  - Transcript
  - Graduation Processing



# Future Integration

- Evisions
  - Transcript Production
  - Installed Test and DEV
- WebCT/Faculty Functionality
  - Banner Plug in Integration
- DARS
  - Creation of Student
  - AP/IB Scores
  - IP courses



# Fine Grain Access

- Specialty Programs
  - Graduate Areas
    - Testing and Developing VBS (Value Based Security)

# Reports

- Departmental needs
- Clearing House
- Ad hoc
- Cognos/Luminus
  - Dashboard reporting
  - Bursts

# The Xtender Team



**Ray McCormack**  
**Andrew Maller**



# What is Xtender?



- Xtender is an imaging solution provided by EMC that has answered all our prayers, well some....
- It has paved the way for elimination of office filing cabinets and lead us in the direction of paperless city.
- Xtender integrates nicely with Banner. When you are reviewing a record, you can easily view any attached documents (App/Transcripts/Awards) attached with one click.



# Milestones



- Xtender is 7 months old at USD
- Admissions (UG/Grad) have scanned and indexed over 84,000 documents
- Financial Aid (UG/Law) have scanned and indexed over 7,000 documents
- I have setup over 140 Xtender users with an average of 60 people operating in Xtender daily
- Faculty Staff were trained and now actively use Xtender to help in decision making and advising students.



# Expansion Plans



- Registrar have been practicing scanning and indexing. They are ready to go live in a few days.
- Law School Records are also planning to go live soon.
- Student Accounts have ordered their scanner and will be going live shortly

# Issues Solved



- Xtender is now securely accessible off campus without VPN access as a tab inside the Luminis Portal.
- We discover Xtender and Macs weren't great buddies. We ironed out most of the flaws and they now operate well. We also provide a Windows Emulator for Mac users depending on the circumstances.

# Documentation



Chris Palmer and I designed and created Xtender booklets that can be easily used by users at their desk. This document outlines the common features and activities in Xtender. It has already proved a huge success with Faculty users. If you would like a booklet please send an email to 'bliss@sandiego.edu'.

We have documentation online at the bliss website:  
[http://www.sandiego.edu/bliss/teams/lum\\_ods\\_xtd\\_report/Xtender/faqs.php](http://www.sandiego.edu/bliss/teams/lum_ods_xtd_report/Xtender/faqs.php)



# Training



- All Departments received formal training from SunGard earlier this year.
- In order to promote new ideas and to answer anything Xtender-related, we will be introducing a session-sharing class starting soon that will run once a month around lunch time.

# Upgrade



Steve Taburiaux and I just completed the large upgrade from 7.02 to 7.2. I will involve user groups shortly to help test new and existing features. Once satisfied we can plan to implement this upgrade on Production shortly.

Some neat new features:

- Self-Service Integration Support (.NET)
- LDAP Certification
- Enhancements and Problem Resolutions



# AppXtender Reports Management (ERMx)



- ERMx is a first-cousin of Xtender and an extremely useful tool.
- It is a server-based application that, once setup, monitors specified directories for PDF files. When it finds a PDF file, it can extract necessary information from the file and use the information to automatically capture and index the PDF application into Xtender.
- Success Story: Financial Aid Award Letters

# The Future



- We will have Xtender operating in 7 different departments (UG & Grad Admission, LS & UG Financial Aid, LS Student Records, Registrar, Student Accounts).
- ERMX will be used by LS & UG Financial Aid and the Registrar office.
- My phone will stop ringing....maybe..

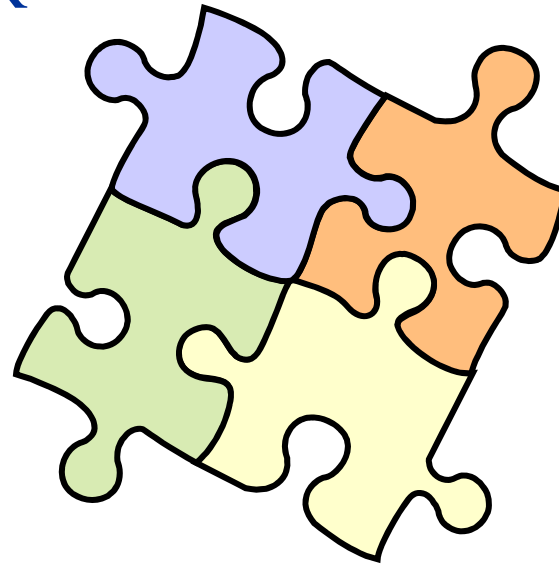
# The A/R Puzzle

Banner Accounts Receivable



# The Puzzle

- BANNER – Student A/R
- CASHNet
- T2 Systems
- StarRez
- C.S. Gold
- Accounting



# Preparing the Banner A/R Instance

- Test-Tube (a.k.a. Test2) Instance
- Loaded Deposits from VAX
- Loaded Balances from VAX
- Moved set-ups from Dev1
- Fee Assessment
  - Rules created
  - Tested for 200802

# CASHNet – Cashiering System

- General set-up's - complete
- e.Bill
- e.Payment
- e.Payment Plan
- e.Marketplace
- Direct Deposit



# Other Partners - Interfaces

- Housing – StarRez with Banner A/R
- Meal Plans – CS Gold with Banner A/R
- Parking – T2 with CASHNet and Banner A/R
- Accounting –
  - Oracle General Ledger and Project Accounting with Banner



# Business Process Analysis

- Tuition Remission
- Deferment Process
- More ahead....



# Next Steps

- Final Approval of Fee Assessment Rules
- Full Test with feeds in and out
- Test automated Student Account Holds
- New Clone of Production – mid-May
  - 200809
- June 1<sup>st</sup> – Move to Dev2 (Integration Test)
- June 18<sup>th</sup> – CASHNet - Go Live!
- July 1<sup>st</sup> – BSAR Go Live!!!
- July 7<sup>th</sup> – Send Fall 2008 e.bill statements



It's the Weekend!!!

Questions???



# Change Management in Banner / Luminis

Andrew Maller

Chris Palmer



# What is Change Management?

- Banner is a large, complicated system: Changes will happen.
- How do we make these changes without causing issues to our users?
- How do we keep track of what we've applied? What we plan to apply?



# How We Choose

- Lists: Outstanding Issues & Enhancements
- How do we hear about Enhancements?
  - Phone calls, feedback in presentations, etc.
  - The main conduit:  
**bliss@sandiego.edu!**



# Change Management: Methods

- Test all changes in test environments before putting them in production
- Where possible, only apply one change per day to production
- Ensure that a record of changes made are kept

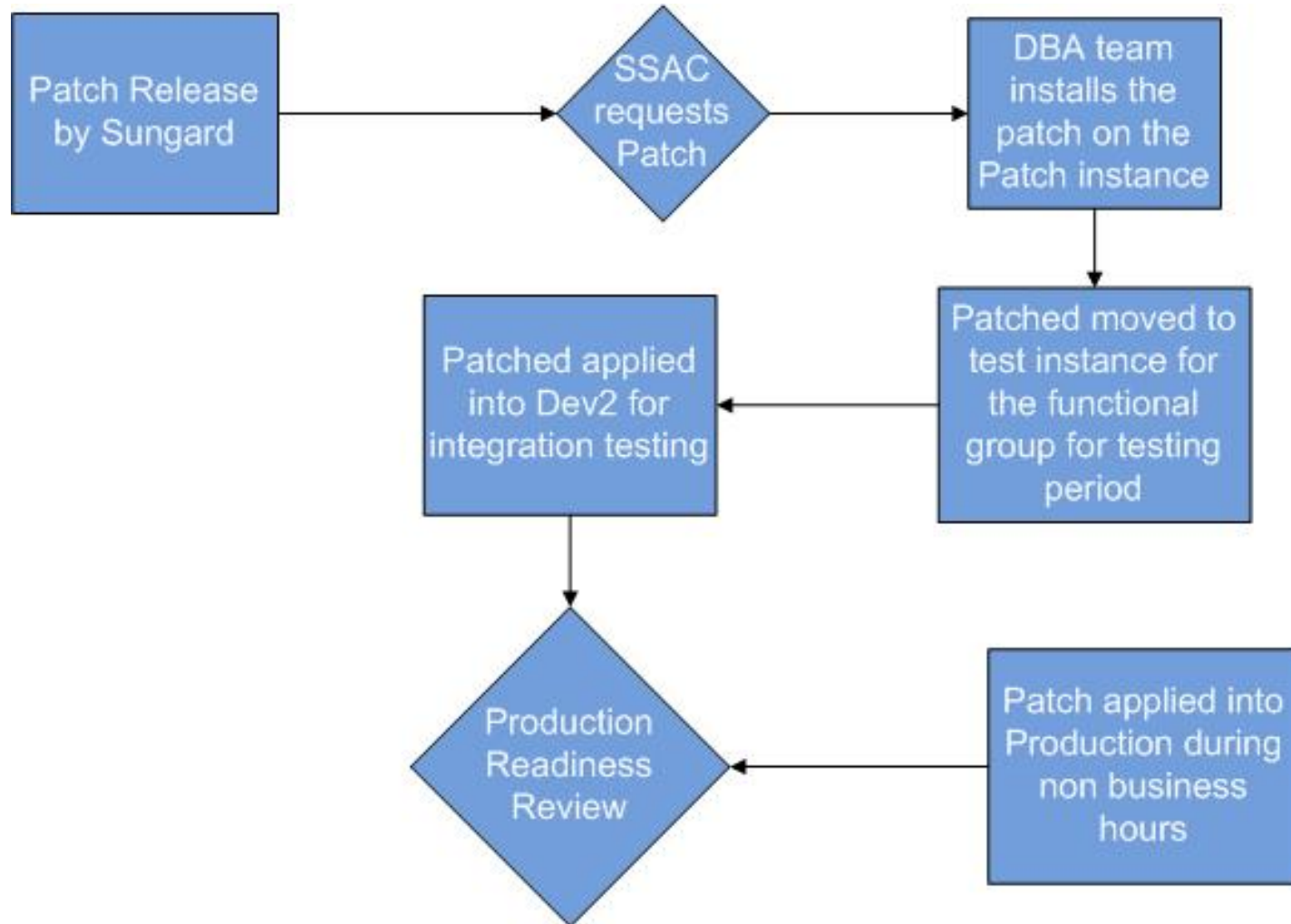
Keep it simple! At the heart of things this process is designed to help key teams work together to accomplish great things.



# Patches and Upgrades

Type	Example
Planned Upgrades	Banner General, Student
Regulatory Patches	Financial Aid
Defect and Bug Fixes Fixes	Production problems and enhancements
Enhancement Requests Requests	Adding pictures of Professors to Course Search

# Patch Process Map



# Production Readiness Review

Why?

- Discuss all key factors to decide whether a module, patch, new feature, etc is ready to move into Production

Who is there?

- Functional team
- Technical team
- Testing Analyst
- Project Director
- Key stakeholders



# Production Readiness Review

What is covered?

- Test Plans
- Communication
- Documentation
  - Technical
  - Functional
- Support
- Backup and recovery planning
- Security
- Report



# Development Instance Breakdown

Instance	Team
Patch	DBA
Training	All Teams
Conversion	Reg Team – Academic History
Dev1	Admissions
Test1	Reg Team
Test2	Student Accounts
Test3	Financial Aid
Dev2	All Teams- Pre Production

# The Documentation

To find out more go online to:

<http://www.sandiego.edu/bliss/>

and click on “Training & Documentation” and then  
“Internal Documentation”

(enter your username & password  
to log in)



# A Peek at Banner 8.0

By Chris Rapp



# Banner 8.0 Availability

- Currently available from Sungard
- 8.1 targeted for October '08
  - Banner 7.x supported and maintained at least through March 2010.
- Documentation
  - Release Guides – Now (xxxxx80000rg.pdf)
  - User Guides – Released w/in 6 Weeks
  - Use the [Sungardhe.com/customer\\_support/site](http://Sungardhe.com/customer_support/site)



# Banner 8.x

## Our Implementation

- This project is not yet defined
- Requires co-ordination between all modules
- All local modifications must be reviewed/re-applied
- All interfaces must be reviewed
- New functionality must be analyzed and tested

# Banner 8.0

## Overview by Module

- General:
  - Security Enhancements
  - Pin Enhancements
  - Globalization of General fields
    - Field sizes increased
- Financial Aid
  - Algorithmic Packaging
  - Financial Aid Self-Service



# Banner 8.0

## Overview by Module

- Student Enhancements to:
  - Transfer Articulation
  - Wait Listing
  - Registration Error Messages
  - Concurrent Curricula Rules Consistency
  - Incomplete Grade processing
  - Self-Service Graduation Application



# Banner 8.0

## More Information

- Xtender is being renamed to:  
Banner Document Management Suite (BDMS)
- Version numbers on ODS/EDW are now at 8.0 (from 3.1)
- All Summit presentations for our modules have been posted to the Shared drive at:  
S:\Banner\Summit 08 Presentations



# A Peek at Banner 8.0

# Questions???



# Duplicate Resolution

By Steffanie Hoie



# Issue

- Duplicates are unavoidable.
- Policies in place to prevent them
  - Limit offices that can create new records
  - Common Matching process
  - Require people to use common matching for manual entry
- Need a tool to merge duplicate records when found
- Need a program to proactively search for duplicates (created several months ago)

# Summit 08

- Several sessions at Summit
- Duplicate merging is not high on the priority list for SunGard
- Many schools tackle this issue by manually resolving records
- Two schools created tools to merge records

# What to do?

- Financial Aid records can not be resolved manually
- Need a quick solution because duplicates in Banner are preventing good customer service to newly confirmed students
- Manhattan College had a free tool that could be installed and used almost immediately



# How does it work?

**Banner PIDM Duplicate** File Connections

Hostname:  Port:  SID:   
Username:  Password:    Status: Connected as baninst1 on dbsvr3.sandiego.edu SID: dev2

**Biographical** Tables Columns

Select  Name Perform Search  PIDM  ID   Run for all Tables on Database  
Enter ID 1:  Enter ID 2:      Run for Banner Tables only

**Pidm 1: 9746**

Last Name:  First Name:  MI:   
DOB:  SSN:  Sex:   
Address Line 1:  City:  State:   
Address Line 2:  Zip:   
Address Line 3:  Seq:  AType Code:    
From Date:  To Date:

**Pidm 2: 149456 ID: 008107395**

Last Name:  First Name:  MI:   
DOB:  SSN:  Sex:   
Address Line 1:  City:  State:   
Address Line 2:  Zip:   
Address Line 3:  Seq:  AType Code:    
From Date:  To Date:

Error Messages:

# How does it work?

The screenshot displays the 'Banner PIDM Duplicate' application window. At the top, there are fields for 'Hostname' (dbsvr3.sandiego.edu), 'Port' (1522), and 'SID' (dev2). Below these are 'Username' (baninst1) and 'Password' fields, along with 'Connect' and 'Log Out' buttons. The status bar indicates 'Connected as baninst1 on dbsvr3.sandiego.edu SID: dev2'.

The main interface is divided into two panes. The left pane, titled 'Pidm 1 Tables: 97466', lists various tables such as GENERAL.GOBINTL, GENERAL.GOBSTRID, and SATURN.SARADAP. The right pane, titled 'Pidm 2 Tables: 149456', lists tables like FAISMGR.RCRAPP1, FAISMGR.RCRAPP2, and TAISMGR.TBRCHG.

Between the two panes is a central area with several action buttons: '(col1 --> col2) Copy all rows-->', '(col1 --> col2) Copy current row -->', '(col1 --> col2) Move all rows-->', '<--Delete all rows from column 1', '<-- Copy all rows (col1 <-- col2)', '<-- Copy Current Row (col1 <-- col2)', '<-- Move all rows (col1 <-- col2)', and 'Delete all rows from column 2-->'. Below these buttons are 'Next' and 'Prev' navigation buttons.

At the bottom of the application window, there are 'Left Table Comments:' and 'Right Table Comments:' text areas. The Windows taskbar at the very bottom shows the Start button and several open applications, including Oracle Appli..., Oracle Develop..., Inbox - Microsof..., Oracle SQL Dev..., C:\Documents a..., S:\Banner\Sum..., Microsoft Power..., PIDM Duplicate ..., and Banner PIDM ... The system clock shows 1:36 PM.

# How does it work?

The screenshot shows the Banner PIDM Duplicate application window. At the top, there is a menu bar with 'File' and 'Connections'. Below the menu bar, the connection details are displayed: Hostname: dbsvr3.sandiego.edu, Port: 1522, SID: dev2. The Username is baninst1 and the Password is masked with dots. There are 'Connect' and 'Log Out' buttons. The Status is 'Connected as baninst1 on dbsvr3.sandiego.edu SID: dev2'. Below the connection details, there are three tabs: 'Biographical', 'Tables', and 'Columns'. The 'Columns' tab is selected. The main area displays two rows of data for 'Pidm 1' and 'Pidm 2'. Each row has a list of columns on the left and a 'Column View' section on the right. The 'Column View' section includes a 'Pidm X Column View' field, an 'Update Column' field, and an 'Update' button. The 'Update Enabled' radio button is selected for 'Pidm 1' and 'Update Disabled' for 'Pidm 2'. The 'Error Messages' section is empty.

Banner PIDM Duplicate

File Connections

Hostname: dbsvr3.sandiego.edu Port: 1522 SID: dev2

Username: baninst1 Password: Password field with dots Connect Log Out Status: Connected as baninst1 on dbsvr3.sandiego.edu SID: dev2

Biographical Tables Columns

Pidm 1: 97466 - 008067463 - Bautista - Timothy - L - null - P - 10/30/2007 23:24:15 - SHOIE - SRKPREL - BAUTISTA - TIMOTHY - L - B323 - T530 - null - SHOIE - 10/30/2007 23:24:15 - null - null - null

PIDM 1: 97466

SPRIDEN\_PIDM  
SPRIDEN\_ID  
SPRIDEN\_LAST\_NAME  
SPRIDEN\_FIRST\_NAME  
SPRIDEN\_MI  
SPRIDEN\_CHANGE\_IND  
SPRIDEN\_ENTITY\_IND  
SPRIDEN\_ACTIVITY\_DATE  
SPRIDEN\_USER  
SPRIDEN\_ORIGI

Pidm 1 Column View: Update Column: Update Update Enabled Update Disabled

Pidm 2: 149456 - 008107395 - Bautista - Timothy - C - null - P - 3/3/2008 8:53:33 - REDDELL - RCRTP09 - BAUTISTA - TIMOTHY - C - B323 - T530 - null - REDDELL - 3/3/2008 8:53:33 - Banner - null - null

PIDM 2: 149456

SPRIDEN\_PIDM  
SPRIDEN\_ID  
SPRIDEN\_LAST\_NAME  
SPRIDEN\_FIRST\_NAME  
SPRIDEN\_MI  
SPRIDEN\_CHANGE\_IND  
SPRIDEN\_ENTITY\_IND  
SPRIDEN\_ACTIVITY\_DATE  
SPRIDEN\_USER  
SPRIDEN\_ORIGIN  
SPRIDEN\_SEARCH\_LAST\_NAME

Pidm 2 Column View: Update Column: Update Update Enabled Update Disabled

Error Messages:

# Issue with tool

- Doesn't work with Xtender
- If documents exist on duplicate id, they will need to be manually moved to the master id before merging
- The duplicate id will need to be deleted from Xtender
- We'll look at enhancing this in the future

# Where are we now?

- Tool has been installed
- Extensive testing in DEV2 has been completed
- Documentation on how to use tool is in progress and mostly complete
- Merging of duplicates in production has begun

# What to do if you find a duplicate?

- Procedure will be outlined in the Data Standards manual which is being updated this summer
- For now, email Steffanie Hoie ([shoie@sandiego.edu](mailto:shoie@sandiego.edu)) the two Banner ids that need to be merged
- Please determine which id should stay the master id and which is the duplicate.
- Ensure that documents have been moved from the duplicate id to master id in Xtender

# Special Thanks

- Chris Palmer
- Suhas Jakkaraju
- Indra Bishop

