

# **BANNER PROJECT COMMUNICATIONS AND TRAINING PLAN**

## **Administration and Finance Information Systems Management (AFISM)**

### **The Charge:**

Reporting to the Senior Vice President for Administration and Finance (A&F), AFISM is charged with Banner project management for the Finance and Human Resource modules for Texas Tech University (TTU). The implementation of these modules will involve A&F staff in Financial Affairs (FA), Business Affairs (BA), Human Resources (HR), and Budget Resource Planning and Management (Budget). This project team will carry out their responsibilities under the institutional objectives established for the Banner implementation:

Objective 1: Implement Banner application as is, with little modification so that the institution:

1. Gains functionality (i.e., more robust reporting) of advanced technology
2. Is positioned for continuing upgrades and enhancements
3. Is not investing in institutional programming that must be maintained in coming years

Objective 2: When institutional operating procedures do not transition to Banner operational procedures, AFISM will:

1. Give first consideration to changing institutional operating procedures to meet the first objective above
2. Advise and recommend options to institutional management for resolving the differences

### **General Phases of Implementation:**

Learning via class instruction and homework. During this phase project team members are learning about Banner, completing homework assignments, and creating hypotheses about the transition to the Banner environment.

1. The Finance Team began this phase in Summer, 2006
2. The HR Team began this phase in Winter, 2006

Initial testing with consultation. As class learning is completed, sample data will be loaded so that hypotheses can be tested. Banner consultation continues as hypotheses and transition considerations are explored.

1. The Finance Team is beginning this phase Spring, 2007
2. The HR Team will begin this phase Summer/Fall, 2007

Full Testing and Refinement. When hypotheses and transition considerations are resolved, the Banner system will be tested in a “break the system” effort to prove volume and complexity fitness (as much as possible), and **will include selected experts from end-user departments.** Refinements will be identified and adjustments implemented.

1. Full system testing should be completed by May, 2008
2. Full system testing includes interfaces with the Student module, as well as interfaces between the Finance and Human Resource modules

Projected implementation and “Go Live.” Following full system testing, the implementation data base will be loaded and prepared for the Go Live date.

1. September 1, 2008 (FY09) for Finance Go Live. Usually purchase orders for the new fiscal year are being submitted as early as March prior to September 1, when the Banner Finance module will be live. The budget for FY09 must be loaded for September 1 operations.
2. December, 2008 for HR Go Live. It is anticipated that certain portions of HR need to be operational with the Finance Go Live date and operate in a background mode until December, when Banner HR will print January 1, 2009 paychecks and begin operations.

### **The Audiences (to whom is AFISM communicating?)**

The HR and Finance Banner Project Team Members: Regarding their project responsibilities for Banner implementation and after implementation continuing maintenance. After Banner is implemented, AFISM will coordinate TTU A&F discussions regarding Banner HR and Finance upgrades, enhancements, etc.

The A&F Staff in FA, BA, HR, & Budget: To provide an across-the-board level of information and to offer everyone an opportunity to be “in the loop.”

The TTU campus end-users of the services provided by A & F staff in FA, BA, HR, & Budget, to inform of upcoming changes to A&F operations that will impact TTU operations:

1. The executive level for overview and progress
2. The Business Managers (and their staff) of divisions, colleges, and front-line departments for operational information and training.

### **The Internal Process for Implementing Banner Functionality**

The project team learns the Banner applications and informs their chain-of-command (the University, the Health Sciences Centers, and the System) of the following:

1. Progress toward implementing the functionality provided by the new technology
2. Differences in Banner procedures and operations from Texas Tech procedures and operations.
  - a. Differences which impact A&F department(s) are left to the department(s) to implement, with approval from A&F.
  - b. Differences due to missing functionality of Banner are returned to the project team to design and implement solutions. For example, Banner does not provide processing of travel applications and vouchers so the current Texas Tech online travel system will be enhanced and made

compatible with Banner. Progress will be announced via the Campus Communication Efforts described below.

- c. Differences gained from the enhanced Banner functionality, such as the improved Chart of Accounts capabilities and the Internet-type appearance and navigation, are prepared for presentation via the Campus Communication Efforts described below.
- d. Differences that impact Texas Tech policy and procedure are returned to the project team to prepare an analysis for chain-of-command review in preparation for institutional approval, per Objective 2 above.

When there are changes impacting Texas Tech policy and procedure, the project team will:

1. Prepare alternative solutions
2. Describe the pros and cons of each solution, and estimated cost of implementation for the institution
3. Draft a recommendation for review and approval by chain-of-command (HSC, TTU A&F, TTUS IS)
4. An example is the Banner Pay ID feature, which refers to the frequency by which employees are paid. In keeping with the institutional Objective 2 for the Banner implementation, and for the most efficient use of the new Banner functionality, Texas Tech is exploring an alternate pay frequency than the current method of payment.

The institutional approval path is as follows:

1. Draft approved by TTU, HSC and System Chief Operating Officers (CFOs)
2. **Draft distributed to the TTU Provost, TTU Faculty and Staff Senates**, and HSC President's Executive Council for comments
3. Comments reviewed by CFOs and the **TTU Provost**
4. Final approval by CFOs and the **TTU Provost**
5. Approval by the ConnecTech Steering Committee
6. Approval by the ConnecTech Executive Steering Committee

Upon completion of the institutional approval process, the new policy/procedure will be prepared for presentation via the Campus Communication Efforts described below.

## **The Campus Communications Efforts**

Town Hall Meetings.

1. The purpose is to bring the campus "into the loop" about the Banner implementation and to request participation:
  - a. **Provide insight and awareness in advance of implementation training, which should reduce anxiety and uncertainty about future changes.** This effort will also prepare the TTU with critical background information prior to implementation training, thus reducing the amount of time which might be spent in class by campus end users.

- b. Request input and feedback about new and changing operational procedures.
- 2. Timing & Frequency.
  - a. The Finance team began attending classes last summer (2006) and the HR team began classes this spring (2007).
  - b. The Finance Team is researching their initial decisions, which involves the new chart of accounts. The HR team is preparing alternatives for consideration to be shared with the campus for input.
  - c. The first Town Hall meetings were held the first week of April, and feedback regarding the structure of the Organization codes (coding the organization chart and the chain-of-command) was requested from the campus. The second Town Hall meetings will occur in June concerning the methods for converting from the present day “Account Number” to Banner’s expense account identification system. The campus will be provided a “draft” cross reference for review and feedback.
  - d. Future Town Hall meetings will be held in increasing frequency during the summer and fall as the HR team reaches initial decisions and as both teams build their knowledge of Banner and how Texas Tech will use the programs.
  - e. Publicity for Town Hall meetings will include the remaining communication efforts listed below.

Executive memorandum, directed to the TTU Senior Advisory Council (SAC), to provide a quarterly overview of progress and upcoming items affecting the campus.

Administrators Group and TechAnnounce. As needed, these forums will be used to communicate announcements.

Executive Project Managers (usually Business Managers of the division/college) – a contact in each division/college to assist with two-way dialog with the A&F Banner Project, and with participation (input, feedback and testing) in the implementation and future on-going maintenance of Banner. Labeled the BEST team (Banner Executive Strategist Team), these individuals are responsible for sharing information with the executive (Provost, VP, Dean, etc.) and vertically throughout the division/college. For the recently completed Town Hall meeting, the BEST Team was instrumental in soliciting and forwarding the feedback to the Banner Project Team.

Meetings are being planned with campus leadership for dialog and feedback.

AFISM Website with services and contacts, open to anyone on campus. A few of the features are:

- 1. Communications Page. A historical record of communications to the campus, grouped by functions, such as newsletters, executive memos, TechAnnounce or Administrator’s Group. This page allows anyone to “catch up” if they have not been in the loop, or to “follow up” if they missed a function.

2. **Banner Progress. A tracking record to inform A&F and campus users, with items-in-process, or upcoming items that will impact operations,** such as program modifications, SunGard enhancements and upcoming versions, TCC progress, etc.
  - a. Banner project management and planning items will be password protected, and not available to the campus.
  - b. General timelines and milestone information is available to the campus community.
3. Learning Resources. As the training function begins, this will be the location of job aids, reference materials, class schedules and descriptions (AFISM will coordinate with Quality Service & Professional Development for class registration and tracking).

AFISM Newsletter, directed to A&F. Probably published quarterly. **Historical copies are available on the website for anyone on campus.**

A & F Staff Meetings. This effort will provide the A & F staff with the same information being provided to the campus via the Town Hall meetings.

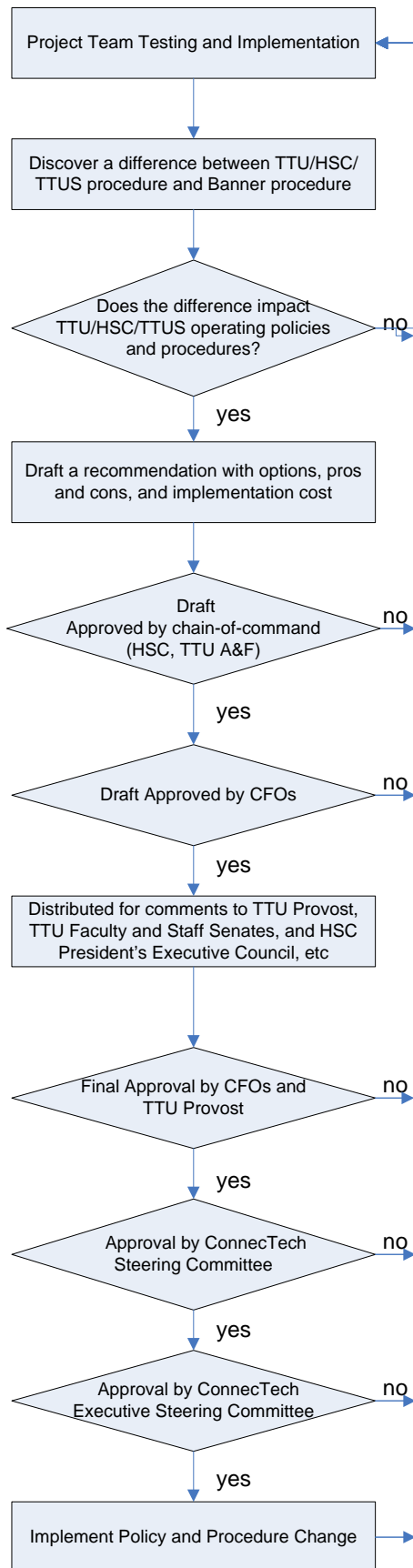
### **The Campus-wide Training Efforts**

**Early training of campus power users who process high volumes or complex transactions, to assist during Banner testing prior to implementation.** This effort will support the testing phase by including end-users for “break the system” testing. An added benefit is that these end-users can become internal consultants within their division/college during the first months of Banner implementation. The training and involvement of these individuals will begin in the Fall/Winter of 2007.

A & F Staff Training. This effort will support the Banner HR and Finance Project Teams by offering classes to their staffs so that the project members are not burdened with on-the-job in-department training. A Banner Navigation class has been developed and provided to all of Drane Hall. Additional classes will be provided as Banner Project teams provide definitions of needed training.

**Implementation training for all end-users prior to implementation.** This is the training of the campus for the conversion to Banner. This training should begin in Spring 2008.

**After-implementation training for new administrators, as needed.** This training will commence with the implementation of Banner.



## Approval Process for Banner Changes That Impact TTU Policy and Procedure