and

SUNGARD® COLLEGIS

Banner Re-Implementation
PROJECT CHARTER
January 2006
Creating World Class Support

In this digital age, technological change spares no school or company. The digital economy has transformed forever how we learn, teach, conduct our business, and serve our students.

There is no debate that new technologies fuel learning, service, and productivity. Through proper planning and proficient execution, we can ensure a prosperous future for our students, faculty, and staff by providing information technology tools they need to succeed. We believe that Wilkes University, in partnership with SunGard Collegis, is well positioned to provide this essential ingredient to success.

This effort is institution-wide, with a focus on what Wilkes needs to “do” with its Banner Administrative systems to create lean, user focused service. The Banner Administrative system will be the base upon which we leverage our technology. Linking--people processes, and data are keys to providing support effectively and efficiently. This linkage is established in the Banner Administrative system that spans academic and administrative units to support common practices, common data and provide a seamless service environment. Technology can then be leveraged through an integrated system to provide one-stop, self-service, 24/7 access to University’s services.

This plan will serve as a roadmap that allows us to chart a course toward achieving a key IT milestone. It is critical that we maintain our focus on the nine key goals that we want to achieve from this Banner Re-implementation and that those goals drive this project.

Scott A. Byers
Vice President for Finance
and Support Operations
Wilkes University Banner Re-Implementation Project Charter

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Wilkes University Banner Re-Implementation Project Charter

I. EXECUTIVE OVERVIEW

In as much as Wilkes desires to create a “Digital Campus” environment, Collegis has agreed to assist in this vision. While it is recognized that this effort concerns numerous initiatives, this charter addresses the specifics relative to the re-implementation of Banner. Due to the fact that other initiatives depend on this effort being completed, it is anticipated that most of this effort will be completed by the end of March, 2006. There are some considerations that ‘going live” dates must be coordinated with the university’s calendar. To that end, the fiscal year will be considered as well as Admissions coordination. Following are the particulars to complete the re-implementation of Banner at Wilkes.

A. Banner Re-Implementation Scope

Specifically, the purpose of the SunGard Collegis effort is to enhance the understanding and use of Banner at Wilkes University. Every effort will be made to promote that “best practices” be properly integrated into Wilkes processes. Key executive goals for the “Digital Campus” include:

1. Web-Centric: Making Banner information available via the web to improve overall efficiencies and ease of access
2. Centralized Data: Provide a uniform manner for creating, storing, and accessing data
3. Reduce Redundant Data: Minimize the creation of duplicate records and conflicting data
4. Increase the Use of Electronic Media and Reduce Paper: Gravitate toward a true “Digital Campus” by the effective use of electronic media and head toward a “paperless” environment
5. Increase Empowerment: Provide students, faculty and staff with the means to complete their objective with a minimum effort from other resources
6. Improve the Focus on Information: Capitalize on available information to improve decision making
7. System-Centric instead of Data-Centric: Focus on reason for the data instead of the data
8. Improve Efficiencies and Review Resource Reduction: Provide the ability to improve services to the student at a lesser cost
9. Enterprise Management Reporting: Capitalize on providing management of the information they needed to guide the university into the future

Core business processes will be reviewed against the goals listed above. The results will be reviewed with Wilkes executive management to determine a course of action for the processes it wishes to implement and which might be considered for a future effort.

It is anticipated that Banner will remain a “vanilla” product to assist Wilkes in taking advantage of future Banner releases with a minimum of effort and confusion. As an integrated data management system, Banner is intended to meet most of the data processing needs for Wilkes and its students. Banner supports the idea of delivering a quality educational experience to students.
Wilkes University Banner Re-Implementation Project Charter

B. Charter Guidelines

The charter is the instrument to be used to guide the Banner reimplementation effort. SunGard Collegis has been asked to “make it happen” in an expedited manner. Therefore, the majority of the Banner systems will be configured by Collegis between January 2006 and March 2006. The Finance system will be extended to a June timeframe and the Student system will be completed in November. Utilizing this model, it is anticipated that Wilkes’ direct involvement will be minimized. However, a knowledge transfer to “core” Wilkes personnel must occur toward the end of each system re-implementation. This is referred to as the “train-the-trainer” method. After this takes place, the Wilkes system teams will train their end-users in the new processes.

The Banner Re-Implementation Project Charter provides guidelines and a roadmap for successful project completion. It establishes the governance process for the Banner project. It provides the guidelines by which those who participate in this project (Collegis and Wilkes) will know their responsibilities and the processes by which issues will be addressed and tasks completed.

This charter presents the goals, objectives, major assumptions and constraints associated with the project. It is to be used as the basis for assigning responsibilities, tasks, managing change, and developing plans and reports. It will also serve as a guide for resolving issues as they arise.

C. Supporting Assumptions

Change is inevitable. It compels us to consider ways to improve. Re-implementing Banner will challenge Wilkes personnel to “rethink” processes to improve performance. The University’s culture will necessarily be challenged to change as improvements are made. This is probably one of the most crucial areas for Wilkes to address in the coming days.

1. Enterprise-Wide System

Banner is an integrated system. Banner information is owned by the University. Common information is shared with user departments to reduce redundancy. This improves accuracy and efficiency throughout the University. All users departments must participate in sharing common data.
2. **Business Processes**
   In developing Wilkes’ best practices, their business processes will be considered. Input from Wilkes is imperative for best practices to be implemented. This is an iterative process and additional reviews may be necessary as best practices are developed. Once completed, these processes will be mapped by Collegis consultants.

3. **Accountability**
   Users will be accountable for institutional information. The Data Standards committee is to assist in creating system rules to facilitate accountability and accuracy, especially as it concerns common data. Even so, user departments must be responsible for the proper entry of their data.

4. **Commitment**
   SunGard Collegis will endeavor to re-implement Banner according to best practices for Wilkes due to the lack of time. The University will, however, provide limited resources as the system is re-configured (approximately 20%). It is anticipated that Wilkes will provide, on the average, 1 day a week for specified core team individuals. However, it would be advantageous to the project, if Wilkes could expend more effort as the final knowledge transfer takes place for most systems during the March 2006 timeframe. The Student system effort will continue to November 2006. Because a new Chart of Accounts is being developed, the Finance timeframe may extend until June but the end of March date is expected for Financial Aid, HR/Payroll, and Alumni Development. In consideration of this, Wilkes agrees to make Banner a priority.

5. **Involvement**
   While Wilkes’ involvement will be kept to a minimum, commitment must remain high. When Banner issues arise, resolutions must receive immediate attention from all parties to prevent delaying this ambitious effort. Conflicts from Wilkes or Collegis must be communicated to Project Management immediately so roadblocks may be addressed and removed quickly.

6. **End-User Training**
   End-user training is very important. The “train-the-trainer” approach will be utilized to accomplish this knowledge transfer. Wilkes core team members must be prepared to provide end-user training. Collegis will assist in the development of a training strategy but Wilkes should be prepared to develop and deliver the actual training. This will ensure that Wilkes is in a position to support and maintain its own documentation for future Banner changes and releases.
D. Boundaries and Constraints

1. System Modifications
Baseline Banner provides a very broad spectrum for product configuration. Wilkes will work within the configuration spectrum to implement Banner without “core” code modifications. This will assist Wilkes in implementing future Banner releases with a minimum effort.

2. Timeframes
Ambitious timeframes have been established. Meeting these timeframes is crucial to meeting the stated target dates. In order to meet these commitments, letting completion dates slip beyond the targeted dates is not an option. If Banner target dates are not met, other initiatives like Cognos, Luminus, etc. may be affected. Accomplishing the stated objectives will require that all parties work as a team toward a common goal.

3. Resource Limitations
Recognizing Wilkes’ resource limitations, SunGard Collegis will attempt to make configuration decisions on the University’s behalf to implement best practices when possible. Since there are so many initiatives straining limited resources, operating in this manner will assist Wilkes in maximizing their efforts. However, policy decisions must remain the responsibility of Wilkes.

4. Workloads
As indicated previously, when Wilkes’ involvement is required, Banner must receive priority attention. Every effort will be made to minimize time required by Wilkes’ staff but timely participation is needed and expected. Workload conflicts should be communicated to management for resolution.

5. University’s Operational Calendar
The re-implementation project will observe the University’s calendar regarding holidays, vacation, and etc.

6. Interface Requirements/Shadow Systems
Auxiliary and external systems relative to Banner will be examined. These systems are categorized as such because they perform functions not utilized in Banner. If, however, the information is already provided in Banner, those systems are referred to as “shadow” systems. Independent departmental “shadow” systems should not be interfaced to Banner due to the duplication of effort as well as potential for inconsistent data. To properly maintain university data, shadow systems represent a risk to data integrity and are not expected to be maintained.
7. **System Integration Requirements**

Being a relational database, Banner is designed to be an integrated system. Integrated systems share information to eliminate duplication, inaccuracy and additional effort. This is also why information is considered University information and is not owned by any one department. Departments may be responsible for entering and maintaining certain data, but all departments share the data as needed. External/Auxillary systems are systems that provide functionality not provided by Banner. When appropriate, these systems may be interfaced with Banner, but the source code will not be integrated into Banner. ITS will support these systems as required.
## II. METHODOLOGY & APPROACH

A. Project Timeline/High Level Overview

### WILKES RE-IMPLEMENTATION SCHEDULE
*(As of January 2006)*

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<td><strong>FINANCE</strong></td>
</tr>
<tr>
<td><strong>FINANCIAL AID</strong></td>
<td><strong>HR/PAYROLL</strong></td>
</tr>
<tr>
<td><strong>ALUMNI DEVELOPMENT</strong></td>
<td></td>
</tr>
</tbody>
</table>

More details are included in Attachment A.
B. Project Schedules

1. Processes/Milestones
   The project milestones/processes are identified, by functional area, in the matrix Attachment A. Collegis consultants will review these areas to identify best practices for Wilkes.

2. Project Tracking
   Collegis functional consultants will develop and maintain more detailed project task lists and schedules for their areas. Resource needs will be identified and scheduled with affected parties. These task lists will be maintained and adjusted to properly track progress toward meeting established timeframe goals. Based upon results of Sungard Collegis reviews and discussions with lead members of the functional areas and associated workgroups, tasks are tailored specifically to meet Wilkes’ needs. These lists will be stored electronically by the Collegis consultants on a Wilkes shared drive designated for project documentation.
C. Project Organization

The project structure employed here includes the team hierarchy, reporting lines, and areas of responsibility. It is expected that issues will be addressed from the bottom to the top. To accomplish this, team leaders will represent their groups to the next higher level. The next step will be to present to the Administrative Processing Committee (APC) as information. The final step will be to the Banner Executive Committee for any areas needing additional consideration. This process allows users that are most familiar with the subject matter to provide insight on their areas of responsibility.
1. **Banner Executive Committee**
Chair ed by the Vice President - Finance & Support Operations, this committee has ultimate responsibility for the successful completion of the Banner implementation project. The Banner Executive Committee provides strategic direction and oversight to the project and serves as the highest authority to resolve policy issues and address the most serious risks associated with the project. This committee’s charge includes meeting scheduled implementation dates and controlling the budget. The committee convenes weekly to review the status of the project and address areas of concern. When necessary, the committee may also hold special ad hoc meetings.

- VP - Finance & Support Operations, Chair
- CIO
- Collegis Project Management

2. **Administrative Process Committee (APC)**
This committee is comprised of the university’s functional directors. As owners of functional processes, directors and their appointees will be advised of best practices so end-users may use them in performing their duties. This committee will convene on a weekly basis. It will provide additional insight for resolving policy and procedural issues. This committee is comprised of the following individuals:

- CIO – Chair
- Collegis Project Management
- ITS Technical Director & Technical Personnel
- Collegis Functional Consultants
- Wilkes Functional Directors

3. **Implementation Committee**
This committee is the daily managing body for the Banner implementation project. Members of this committee are Collegis consultants and ITS personnel. The committee is responsible for recommending and establishing functional/technical practices and procedures.

While working closely with Wilkes functional personnel, this committee will assist in defining “best practices” and University data standards. This group will serve as the “architect” of “best practices” for Wilkes. In addition, processes, risks, and issues will be evaluated. The committee will advise Wilkes on progress made toward milestones and will identify issues that need to be resolved. Many issues will be resolved by this committee alleviating the necessity of escalating them to the APC and Executive committees.
There will be a weekly status meeting to discuss project progress. Committee members will also meet frequently as needed in an informal setting to facilitate discussion on project topics. Committee members include the following:

- CIO/Director of ITS
- Collegis Functional Consultants
- Select ITS
4. **Banner Work Teams**

System teams will consist of a Collegis Consultant, a member of the ITS staff and key users from the functional areas. A Wilkes “point” person will be appointed for each module work team. This person should be a module manager with the ability to make change decisions to improve the Banner system as well as departmental decision policy.

**Collegis Responsibilities:**

* **Consultants**
  - Maintaining task lists for the project
  - Providing weekly status reports to track progress of the project and identify issues that Wilkes will address
  - Leading and scheduling all work sessions
  - Designing and mapping revised processes for best practices
  - Providing documentation of Banner process parameters
  - Building and documenting validation table and rule values
  - Assisting in preparation of conversion/mapping functional specifications
  - Assisting with security specifications
  - Providing “train-the-trainer” knowledge transfer
  - Performing unit testing of Banner solutions
  - Assisting in development of end-user test plan templates

* **ITS Technical Staff**
  - Developing technical specs for reports (including E-Visions)
  - Developing reports
  - Developing technical specs for conversion/mapping
  - Coding and initial testing of conversion scripts
  - Developing and maintaining Population Selections

**Wilkes Responsibilities:**

- Attending team meetings as scheduled
- Reviewing current practices, processes and procedures
- Reviewing recommended process changes
- Reviewing recommended validation table and rule changes
- Reviewing recommended conversion/mapping schemes
- Development of test plans and testing
- Identifying reporting needs
- Addressing issues in a timely manner and escalating as appropriate
- Providing end-user training and documentation
5. Work Team Overviews

Finance Work Team

The Finance portion of the re-implementation project has taken a dramatic change in course with the decision to re-implement the Chart of Accounts (COA). Not only is the COA the core of the Banner Finance system, it is intricately tied to other Banner Systems, specifically Human Resources, Student Accounts Receivable and Alumni. Changing the COA will enhance the performance of the Luminous portal.

Given the ambitious schedule for other Wilkes initiatives, the Finance “best practices” effort is due to be completed by March 31st 2006. Planning for the re-implementing of the COA must be completed at this time so other efforts are not delayed. Once completed, the new COA cannot actually be activated until the end of Wilkes’ fiscal year (May 31, 2006). Plans are for the Collegis Finance consultant to remain until the first of June to assist in converting to the new COA.

Prior to the March 31st 2006, Wilkes University will have in its possession all the information required to load the new COA into its production database. As changing the COA is a key component, it demands meticulous attention. It represents a significant effort in the entire scope of the project. For this reason, other Finance processes will be reviewed briefly and implemented according to their impact to the overall effort. Core team members will then deliver training to end-users. This approach will prepare the University for subsequent Banner releases. In addition, major improvements involving the purchasing module can then be made.

Introducing requisitions and receiving to Wilkes University will allow the institution to complete the requisition to check cycle in an expeditious fashion. Cycle time will be reduced, as will paper usage and handling. In addition, the University will have more control over the purchasing process. There will be positive impacts on Accounts Payable and Fixed Assets processing because the “front” work is accurately captured prior to usage in either module.

Re-implementing the Chart of Accounts at Wilkes University will provide many benefits. Reporting will be simpler, faster and more accurate. Financial operating activities will be streamlined. And the University may confidently move forward to Luminous, allowing specific stakeholders to access and update Banner Finance information across the world-wide web. This is an important milestone in the Digital Wilkes effort!
**Wilkes University Banner Re-Implementation Project Charter**

**Student Work Team**

The Student system will formally begin its re-implementation in January 2006. Each Student module’s business practices will be examined by work teams consisting of users across departmental boundaries. This will prompt the design of truly integrated system-centric applications. The Collegis Student consultant will design solutions for each module that reflect best business practices within the constraints of Wilkes’ policy.

The Student system work teams are composed of a Collegis consultant, leaders from the associated student areas, an IT technical resource. The Student work groups are listed below:

- Recruitment/Admissions
- Student
  - Catalog/Schedule
  - General Student
  - Registration
  - Academic History
- Student AR
- Faculty Load
- CAPP

Work team members will be expected to devote eight hours per week to the Banner re-implementation project. Six hours will be devoted to regularly scheduled work sessions. The remaining two hours will be scheduled for independent work as well as meetings to co-ordinate with other Banner modules. Members of the work groups must meet for work team sessions once work has begun on their respective Banner areas.

The re-implementation effort will utilize Banner 7 in a training environment. The go-live date for this effort will focus on the spring 2007 term. This means it will be activated by October 2006 for spring registration. Processes will be implemented within timeframes that are appropriate for the respective processing cycle.

The Student system re-implementation will focus on changing operational procedures to meet Wilkes’ Executive Goals (See Attachment A) for a digital campus. Currently, there are major areas of the University that are not using Banner at all while others are under-utilizing the Banner. The goal will be to bring all processes into Banner utilizing the Web capabilities of to their fullest extent.

**Financial Aid Work Team**

The Financial Aid system work teams are composed of the leaders of the Financial Aid department and a Collegis Financial Aid consultant. Work teams are composed of Financial Aid representatives who should be familiar with how specific functions are performed at the University.
Wilkes University Banner Re-Implementation Project Charter

These users are the cornerstones for re-implementing Banner. They will become the future end-user trainers for their areas of expertise. These Wilkes staff members are the ones who will be responsible for the ultimate success of the re-implementation effort.

Work team members are required to devote eight hours per week to the Banner re-implementation project. These hours will be distributed among sessions to discuss current practices; what can be done better to implement best practices. Other responsibilities include: testing; writing documentation; and end-user training. It is the responsibility of the work team members to see that their area is implemented within the timeframes identified and presented in Attachment A.

A review of Financial Aid processes indicates that most functions must be re-implemented. There are a couple of areas where the Banner functionality has never even been activated. These best practices will allow Wilkes to provide enhanced customer service by creating a uniform process for data entry; more accurate data will be captured via the web enabled features. Reporting will also improve dramatically. In providing best practices, Wilkes will move one process away from the financial aid department and put it in the Accounts Receivable area. The results of these efforts will increase efficiency in the department and eliminate paperwork. Overall, best practices will provide a more efficient process while providing a student-centric focus.

**HR/Payroll Work Team**

The HR/Payroll module is composed of team leaders assigned to the HR/Payroll and Position Control groups with a Collegis consultant. The re-implementation plan is based on weekly meetings, one-on-one sessions, and training activities related to the needs of the University. Objectives, needs analysis and applications reviews are constantly evaluated and are dependent on the results of the processes analysis.

The goals for this effort center on the issues articulated by the sponsor for a digital campus. Streamlining processes; thinking in terms of web centric results and seeking methods to enable the users are key goals of the reimplementation. There is a need to provide employees with on-line information including personal information; pay and tax information; a campus directory and leave balances in the Web for Employees module.

Included in the long range plan are the Web Time Entry and/or departmental time entry allowing employees to enter time during selected periods each pay period into an on-line application. This process streamlines the payroll activities and greatly reduces the manual tasks associated with hourly or positive time employees. A second key need that has previously been discussed is the reassignment of many HR
activities now performed in payroll. The processes related to employment administration including employment records, position class codes and employee codes along with job assignment records will be the first need as part of the overall reimplementation.

The overall plan is to begin with employment administration and related forms and reports along with the baseline needs in Position Control. The core processes must be established and built with the University's future needs in mind. Several of the University users must be actively involved in establishing how to configure the validation tables, rule tables and application processes. Additionally, this plan will provide these key individuals with training in the base elements of Banner and speed up the knowledge transfer so essential to a successful project. The last phase of the HR/Payroll reimplementation will be a complete analysis of the payroll process and related issues such as time entry; adjustment to payroll, payroll reconciliation and deferred pay practices.

The HR/Payroll system needs to be thoroughly reviewed and examined to determine which processes and enhancements will bring the University the best results. Most of the HR users have never received training and are not familiar with the types of processes provided. In addition, they need to be trained in using the resources available both on-line and within the system. Users will be trained to access all of the resources available to streamline their system. Training on how to use the “Bookshelf” and access the “Action Line” as well as the daily flow of information on the List Serve will provide Wilkes staff members with a resource to continue their learning after the project is completed.

The system will run faster and operate better when the old and unwarranted codes are removed and new systems installed. At the completion of the project in March 2006, the HR/Payroll users will have been trained to use all enhancements offered through Banner 6 and received the knowledge transfer providing them with the ability to go forward in assisting and training those at the University who will be involved with Banner.

**Alumni Development Work Team**

The SCT Banner Advancement product is also known as Banner Alumni. The Advancement system at Wilkes consists of the staff and related Banner Advancement data in the Alumni Office and Development Offices.

The Wilkes Advancement office received good consulting support from SCT when they were at Wilkes, so the Advancement system is running with good range and use of the various Banner Advancement system functions. Consequently, Wilkes does not have much to put into operation.
in the Advancement system. The only product that needed to be employed as part of the reimplementation was the Alumni Self Service piece with a link to the Wilkes Mentoring program which has been completed.

The focus at Wilkes in the Advancement system has been the process areas in their office. Although the Banner product is being utilized extensively, there are no written processes in place, no examination of work flow, and no documentation of processes. Because of some staffing issues, dissemination of crucial Banner information to end-users has been weak. There has been several staff changes in the Wilkes Advancement office so there are inconsistencies in Banner product knowledge within the office.

The primary objective is to build processes, focus on Wilkes’ best practices, and to ‘empower’ end-users. We have an ambitious training schedule for the work groups from January through March. During these training weeks, we will also work on defining and documenting the processes that accompany Banner functionality in the Banner Advancement module.

**Data Standards Work Team**

The Data Standards team is an adjunct team to the re-implementation project. Because it is an on-going effort, the project team must coordinate certain aspects of the project with this team. The Data Standards team is an existing team that will continue to function as such. It is simply recognized here that coordination will be required. Contact with this team will be established as need arises.
III. PROJECT ADMINISTRATION

A. Communications Management
The primary communications tool for implementing Banner is the “Shared Folder”. It contains all of the information necessary to coordinate the Banner project. This will serve as the “go to” place for information related to the project.

B. Training
1. Collegis Consulting/Training
Collegis consultants will provide “hands-on” assistance and training to the System teams. They will consult on “best practices” to promote the most successful use of Banner.

2. Wilkes End-User Training
Wilkes will be utilizing a modified “train the trainer” model. The core teams will ultimately train the end-users in their respective departments. In most cases end-user training will be hands-on. A more definitive end-user training plan will be developed as system work teams become more familiar with their responsibilities.

3. Training Documentation
It is imperative that the work team leaders document end-user training. Collegis consultants will document “best practices” but the core team must ensure that these practices are reflected in the every day processes for end-users. Collegis consultants will assist in determining is developing a training curriculum. Each system work team must develop its own end-user documentation. This documentation is vital for the future success of Wilkes functional departments. Each team’s documentation will provide the basis for the future training of the end-users. The documentation must also record the procedural decisions made by Wilkes and the reason for each decision. This will ensure consistent application of Banner rules and tables. It is suggested that documentation be prepared as train-the-trainer training occurs because it must be ready before training of end-users begins.

C. Status Reports
Status reports will be prepared by the Collegis consultants each Friday. This will assist in keeping project participants up to date with activities.

Identifying issues early will facilitate the orderly implementation of the project. An issue is defined as a concern that has been identified and is probably outside the purview of the Collegis consultant to resolve. These are typically policy decisions.
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Most issues will be resolved at the APC. Policy matters remain the responsibility of Wilkes. These issues will be included in the Weekly Status Report.
IV. GLOSSARY

Auxiliary System
These are software systems not directly integrated with the central administration system (Banner). These are systems that facilitate authorized university business functions and interface with Banner. Examples include: Bookstore, WebCT, Library, and Wilkes Police.

Banner
Banner is the SunGard’s Enterprise Resource Planning (ERP) solution chosen by Wilkes to provide an integrated data management system for the entire university.

Data vs. Information
“Data” is defined as the content: facts and figures. “Information” is the interpretation and value placed on that data.

ERP
The Banner system is an Enterprise Resource Planning (ERP) system.

External System
Computer systems not directly connected to the central administration system (Banner).

Integrated System
Essentially, integration refers to the combined or coordinated use of data from disparate sources. Example: Student names entered in the Banner Student module integrate with the Human Resource/Payroll system. Therefore, if a student becomes an employee, his or her name already exists in the system and need not be entered again. This functionality reduces keying errors thereby reducing duplication of effort resulting in greater efficiency.

Interface
A computer program used to transfer data between two systems.

Module
A module is a unique component of any one of several systems in Banner. An example might be the Admissions module that is a part of the Student system.

Sungard Collegis
Consulting partner contracted to assist Wilkes with Banner implementation and training.

Sungard SCT
Systems and Computer Technology Corporation (Vendor)

Shadow Systems
Shadow systems are actually systems that are duplicating databases or processes that have been developed by individual departments to meet a specific need they may have had in the past. Since Banner provides that function already, a shadow system is not needed.
SMEs
Subject Matter Experts

System
System might refer to one of the major components of the overall Banner system such as finance system, student system, etc.

End-User
An end-user is an individual that accesses Banner in the performance of their duties. This may be anyone from a clerical type to a VP or President.
## ATTACHMENT A

**WILKES PROCESS REVIEW & TRACKING FORM**

*(Updated: 01/18/06 Rev RQ)*

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We decided to put ACH on the back burner because it does not give the University much, if anything, in the way of an enhancement.

Bid processing does not give the University much in the way of streamlining operations. Much of this process is manual even after the implementation. Most clients do not use Banner Bid Processing. We decided implementing requisitions and receiving would benefit the University much more in the way of automating processes.

The University does not keep a stores inventory. The University does not account for inventories of consumables. This module would normally be implemented when the need arises, i.e. when there is a cost benefit. To implement this at all would mean a new department and the associated staffing. The staffing and space costs alone make implementing this module questionable. I recommend not using this module until there is a clearer cost benefit.

Cost Accounting in Banner is actually a job order costing system. Normally a University will hire and train an accountant in the maintenance department to do the data entry work required to charge back maintenance cost to departments. Currently Wilkes University allocates these costs by formula, which is much cheaper and totally acceptable. I recommend Wilkes University keep allocating costs the way it is currently done.

Artifact/Purge is not a critical issue like it once was. This is primarily due to the today's very low cost disc space. This item is easily put on hold until the new Chart of Accounts is implemented.
## FINANCIAL AID - Mario

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## Wilkes University Banner Re-Implementation Project Charter

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