

## UDM's Enterprise Solution



Path to our Future

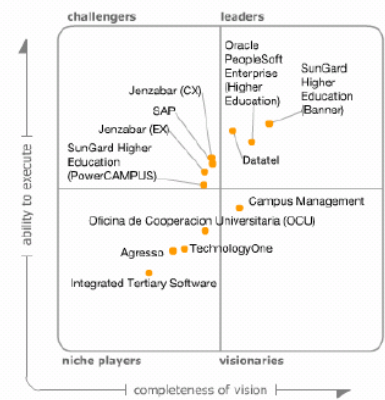
## State of the existing "Enterprise"

- Over 15 Distributed Solutions
  - Contracts, specialized staffing, hardware, etc.
- Core software solution (APECS) at end-of-life
- Core hardware solution (Unisys) at end-of-life
- Existing technologies do not provide a solid foundation to implement efficiencies or build new solutions upon

## Today ITS is unable to affordably deliver...

- ...seamless integration between systems
- ...full scale self-service for all constituents
- ...a security solution to protect our data
- ...a business continuity/disaster recovery solution
- ...continuous business improvement
- ...the infrastructure for competitiveness

## Gartner Industry Leading Solutions



Source: Gartner (September 2006)

## Primary Selections

- SCT Banner
- 1700 IHE
- 15 AJCU IHE
- Gartner Leader Quad
- Integration with BB
- Portal (mature)
- WSU, LTU, UMF, UMD, OU, etc.
- Datatel Colleague
- 700 IHE
- 6 AJCU IHE
- Gartner Leader Quad
- Integration with BB
- Portal (just released)
- Marygrove, Macomb CC, Calvin, Cornerstone, HFCC, Oakland CC, Schoolcraft CC, etc.

## Significant Enhancements

- Integration of data across units
- Portal
- Workflow
- 24\*7 self service
- Degree audit
- End user reporting
- Support for distance and online courses
- Integration with Blackboard
- Integration with e-mail
- Document management
- Security
- Centralized authentication for single sign-on
- Relational database
- Space management
- Housing management
- Fixed and store inventory management
- Budget development and position control
- Endowment Management

## Vendor Visits

### Banner

- Jul 06 Overview
- Jul 06 Overview
- Oct 06 HR

### Datatel

- May 06 Overview
- Aug 06 Finance
- Nov 06 Portal

- Over 100 reviewers
- Compuware Recommendation
- Multi-year relationship
- Educause

## Selection - Banner

- The more complete solution
- The product that appears to best meet our primary goal for full integration
- The AJCU winner
- The national winner
- Workflow
- Portal
- Underlying technology
- Smoother integration with Blackboard
- Tighter integration with e-mail and calendaring
- Proven, integrated and reliable

# Systems

## Today

- APECS
- Blackboard
- Cascade
- Ceridian
- CommuniGate
- CTC Core
- Cypress Spool
- Decision Support
- EDE
- EMAS
- Exchange
- FassetTrack
- Imagenow
- LoTrak
- my.udmercy.edu
- Odyssey
- Opti
- Raiser's Edge
- UDM 2000
- UDM Evals
- UDM Course Catalog
- UDM Course Schedule
- Many "shadow" Excel solutions

## Tomorrow

- Banner/Luminis
- Blackboard
- Cascade
- EPrint
- Exchange
- Odyssey
- Oracle
- UDM 2000
- UDM Evals
- WebExtender

## Distributed

- Library
- Dental ERP

# Partners

**SUNGARD** HIGHER EDUCATION



# AJCU Banner Schools

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• Canisius College</li> <li>• Creighton University</li> <li>• Fairfield University</li> <li>• Fordham University</li> <li>• Georgetown University</li> <li>• Gonzaga University</li> <li>• John Carroll University</li> <li>• Loyola Marymount University</li> <li>• Loyola University New Orleans</li> <li>• Rockhurst University</li> </ul> | <ul style="list-style-type: none"> <li>• Saint Joseph's University</li> <li>• Saint Louis University</li> <li>• Univ. of San Francisco</li> <li>• Univ. of Scranton</li> <li>• Xavier University</li> </ul> |
|--|---|



# Michigan Banner Schools

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• Albion College</li> <li>• Andrews University</li> <li>• Eastern Michigan University</li> <li>• Davenport University</li> <li>• Ferris State University</li> <li>• Grand Valley State University</li> <li>• Hope College</li> <li>• Kalamazoo Valley CC</li> <li>• Kettering University</li> <li>• Lake Michigan College</li> <li>• Lake Superior State University</li> <li>• Lansing Community College</li> <li>• Lawrence Technological University</li> <li>• Michigan Technological University</li> </ul> | <ul style="list-style-type: none"> <li>• Northern Michigan University</li> <li>• Northwestern Michigan College</li> <li>• Oakland University</li> <li>• Southwestern Michigan College</li> <li>• University of Michigan-Dearborn</li> <li>• University of Michigan-Flint</li> <li>• Washtenaw Community College</li> <li>• WCCC</li> <li>• Wayne State University</li> <li>• Western Michigan University</li> </ul> |
|--|---|



SunGard Banner 30m Demo  
February 15, 2007  
1:00 pm  
LS 113

Joe Belenardo and the  
SunGard Team

[If SunGard present's click here.](#)

## Banner Major Modules

- Alumni/Development
- Finance
- Financial Aid
- Human Resources
- Student

## Alumni/Development Module

- Provide effective management of alumni information and events including maintenance of historical information.
- Provide effective and accurate tracking of cash gifts, pledges and outstanding pledges, estates, matching gifts, and other development records, allowing for management of historical data on donors and prospects to include tracking progress of prospects through cultivation, solicitation, and stewardship.
- Provide an effective means of managing the gift accounting and acknowledgement process.
- Allow for coding of donors/prospects according to region and/or interest.

## Alumni/Development Components

- Constituents, Prospect Management, Organizations, Solicitor Organization, Membership, Campaigns, Event Management, Designations, Gift and Pledge Processing, Payment Processing, and Advancement Self-Service.

## Finance Module

- Maintain all required accounting records in accordance with GAAP, NACUBO, the federal government, and other agencies and standards.
- Maintain all accounting records and files to ensure accurate and efficient budget management, from both a current and historical perspective.
- Ensure that all requirements for financial statements, audit reports, grant reports, IRS compliance audits, etc., can be met accurately and efficiently.
- Ensure that all internal requests for any type of financial information (individual payroll, departmental revenue or expenditure, etc.) can be met promptly.
- Provide authorized end-user access to appropriate financial information on line.

## Finance Components

- General Ledger, Fixed Assets, Purchasing and Receiving, Cost Accounting, Accounts Payable, Accounts Receivable, Stores Inventory, Budget Development and Position Control, Research Accounting, Endowment Management, and Finance Self-Service.

## Financial Aid Module

- Provide annual updates of recent regulatory changes affecting the administration of the federal student aid programs.
- Provide for enhanced budgetary controls in order to monitor offers, acceptances, and declinations of all types of financial aid.
- Reduce redundancy between the Student Employment, Financial Aid, and Payroll databases for student worker data.
- Allow for certain holds to be created that are document- or fund-specific in order to allow or prohibit certain types of financial aid from being awarded or disbursed.
- Provide for automation of the receipt and accounting of electronic fund transfers for student loan proceeds.
- Eliminate the majority of manual efforts involved in monitoring of satisfactory academic progress.
- Allow for incorporation of a financial aid voice response system.
- Provide for automated packaging of financial aid based on packaging philosophies and criteria determined by our financial aid management.
- Provide for efficient passing of applicable taxable aid (i.e., waivers) information to Payroll.

## Financial Aid Components

- Applicant Record Creation, Funds Management, Requirements Tracking, Disbursement, Budgeting, FFELP and FDSLPL Loan Processing, Need Analysis, Verification, Student Employment, Award History/Transcripts, Electronic Data Exchange (EDE), Reporting, Packaging. Self-service functionality for Banner Financial Aid is included with the Banner Student Self-Service component.

## Human Resources Module

- Provide an integrated database for Human Resources and Payroll to streamline and enhance management of employee records.
- Provide a source of data on applicants and employees that HR can use to monitor, manage, and plan various aspects such as Employment Administration, Job Classification, System Design, Total Compensation System Design, Benefits Administration, Equal Employment and Affirmative Action Compliance, Position Management, Position Control, and Employee Relations Administration.
- Provide a source of data for federal and state compliance reporting.
- Provide the ability to maintain and report historical salary and benefits data by program, department, and/or employee group.

## Human Resources Components

- Applicant Tracking, Position Management, Employment Administration, Personnel Services Budgeting, Compensation Administration, Time and Attendance Reporting, Employee Relations Administration, Payroll Calculation, Payroll Adjustments and History, Health and Safety Administration, Benefits Administration, and Employee Self-Service.

## Student Module

- Provide for automated billing and letter generation functions throughout the Student system.
- Provide for the advancement of institutional research, through the availability of centralized data, for retention and marketing efforts.
- Allow restricted access to students in order to eliminate unnecessary processing steps.
- Provide for an accurate, streamlined process for academic records from Recruitment through Degree Audit.
- Provide services to achieve enrollment goals.
- Provide faculty access to advising information.
- Provide for a centralized location management facility.

## Student Components

- Course Catalog, Class Schedule, General Person, Faculty Load, Location Management and Housing, Accounts Receivable, Academic Records/Transfer Articulation, Recruiting, Admissions, General Student, Registration, Curriculum, Advising and Program Planning (CAPP), Student Self-Service and Faculty and Advisor Self Service.

## Additional Components Included

- Workflow
- Luminis
- E-Mail
- Blackboard Integration
- E-Print
- WebExtender

## Future Projects

- BB Enterprise integration
- ID Card integration
- Transaction system for dining, pay-for-print, etc.
- Time stamp (proposed in-house solution)

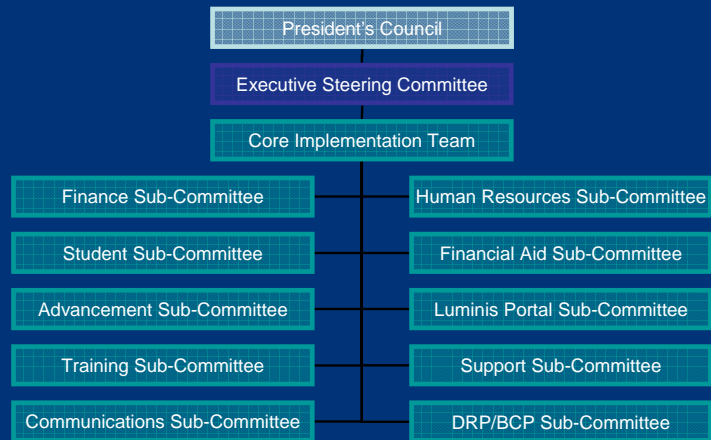
## Implementation Process

- 18 Month Process
- Time lock due to regulations for Finance and Human Resources
- Student, Financial Aid and Advancement to follow
- University wide project

## Goals

- Fulfilling our University mission
- Business process redesign across the entire University, implemented within a new enterprise system, for a more efficient environment and greater levels of student, faculty and staff satisfaction
- Providing a centralized platform upon which future solutions may be achieved

## Governance Structure



## Charges in General

- President's Council
  - Final decision makers
- Executive Steering Committee
  - Project management, project finances oversight
- Core Implementation Team
  - Enterprise wide business process design
  - Coordination
  - Configuration management
- Sub-Committees
  - Specific functionality issues

## Timeline

- Refer to hand-out
- Major milestones
- Already in motion
- Communication
- Committee structure
- Arrival of Banner materials
- Hardware Order
- Server room redesign

## Additional Benefits...

- More efficient use of facilities as a result of automated scheduling
- 24\*7 service to students, faculty and staff via online self-service
- Elimination of down-time and errors from data synchronization processes
- Elimination of multi-account creation
- Elimination of manual PIN lookups via auto-password change functionality
- Electronic access to all records via document management
- Elimination of duplicative data entry
- Time savings via online requisitioning

Questions – Clarifications?