



# **Morehouse School of Medicine Enterprise Transformation Project Project Charter**

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Robbyn Ingram, Tony Cranshaw, Tim Morrison  
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# 1 Executive Summary

The purpose of the Enterprise Transformation Project (ETP) at Morehouse School of Medicine (MSM) is to provide an integrated database management system that meets the needs of the Institution. The Banner implementation will directly support the mission and will help the Institution meet the “Operational Excellence” objectives of MSM’s Strategic Plan by *“Fostering the highest standards of operational performance, fiscal discipline and service benefit.”*

Morehouse School of Medicine will be implementing SunGard Higher Education’s Banner software, hosting and associated services. The combined Morehouse School of Medicine and SunGard Higher Education project team is charged with implementing the 18 month project by the summer of 2011. The project includes the implementation of Banner Finance by July 2010, Human Resources / Payroll by January 2011, Student Registration by March 2011, Financial Aid by February 2011, Luminis Portal starting in November 2010, ODS/Cognos reporting starting in October 2010; conversion of existing Legacy data and training.

Donnetta Butler, CFO and Senior Vice President Finance & Administration, of Morehouse School of Medicine, the Executive Sponsor of this project; will lead Steering Committee and Key Stakeholders to oversee and provide governance for the project. The project has been chartered with implementing the Enterprise Transformation Project (ETP) for the following:

- A fully integrated electronic campus
- Improved / Enhanced Reporting
  - User friendly reporting
  - Timely submission of compliance data
  - Self-service report writing
- Improved communications
  - Organization-wide
  - Project communication
  - Information sharing
- Single sign-on for all systems
- Greater / improved efficiency
- Improved position budgeting
- Elimination of silo/homegrown systems
- Institution-wide use of best practices
- Self-Service tools
- Streamline processes
- Documentation of policies/procedures
- Integration of shared data warehouses
- Better defined roles and responsibilities
- Automation

- o F&A monthly calculations
- o Budget rolls
- o Year-end close process
- o Liquidation of encumbrances per project period
- o Billing
- o Awarding
- o Electronic Requisitions, Pas, etc.
- o Budget checking
- Dashboard reporting (projections & Sr. Leadership needs)
- Fiscal/Project period reporting
- Web portal
- Institution-wide use

## 2 Introduction

The Project Charter formally announces and publishes the high level scope of the Enterprise Transformation Project (ETP) implementation to all project stakeholders. Developing the Project Charter is primarily focused on documenting the business drivers, defining at a high level the project scope, defining the key resources to implement the project, and setting forward the high level timeline for the implementation at Morehouse School of Medicine. The Project Charter authorizes the Project Management Team to marshal the necessary resources and expend the necessary effort to implement and deliver the contracted services. It addresses at a high level the following information:

- Business Drivers and Key Objectives
- Project Scope and Budget
- Critical Success Factors
- High Level Risks and Mitigations
- High Level Assumptions
- Implementation Plan
- Quality Assessment
- Project Organization
  - o Project Sponsor
  - o Project Steering Committee
  - o Project Management Team
  - o Project Functional and Technical Teams
- Key Milestones

### 3 Business Drivers and Key Objectives

Morehouse School of Medicine has purchased the SunGard Higher Education solution to facilitate MSM's initiatives. The business drivers are the challenges that Morehouse School of Medicine has and will face with their administrative operations. These business drivers are the basis of their decision to purchase Banner and undergo an implementation project to address the gaps and challenges of their current solution.

#### 3.1 Business Drivers

- *Current reporting solutions are inflexible and require significant technical support for normal business operations*
- *User interface is not intuitive and does not easily provide end user help facilities*
- *Current system is based on legacy technologies and does not provide benefits of modern web-based technologies like enhanced mobile and remote capabilities*
- *Create a fully-integrated enterprise-wide system of record that provides information for better decision making and mitigates risk*
- *Improve service to students, faculty, staff, alumni, parents, donors, applicants and prospective students and other community members.*
- *Streamline business processes and practices that align individual departmental initiatives with institutional strategic goals*
- *Take full advantage of new and emerging technologies which is not possible in the legacy environment*
- *Provide a simplified and unified University technology platform creating a sustainable framework for application integration and information/data source.*

#### 3.2 Objectives

The following objectives were derived from the initiation and planning sessions jointly held by the Morehouse School of Medicine and SGHE project team.

- *Complete the project on time and on budget for defined scope*
- *Provide students faculty and staff with 24/7 improved web based access to MSM data through the implementation of the four Banner modules: Finance, Human Resources / Payroll, Student, Financial Aid and Luminis*
- *Empower users to easily prepare reports from data that is available to them*
- *Acceptable system performance by MSM's standards (i.e. system response time and stability)*
- *Adoption and institution of administrative and operational best practices that align with the Banner solutions*
- *Adoption and institution of IT best practices, processes and procedures, that align with the new technologies and environment, including ongoing maintenance and support, data integrity, and security*
- *Provide system tracking capability for fiscal, regulatory and compliance issues.*

- *Eliminate or reduce ad hoc external databases, applications, and shadow systems (excel spreadsheets, access databases, flat files, etc.)*

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## 4 Project Scope and Budget

In accordance with the Software License and Services Agreement between Morehouse School of Medicine (MSM) and SunGard Higher Education (SGHE) dated December 29, 2009, MSM agreed to acquire the Banner Applications listed below. These SGHE Banner systems will replace and enhance specific MSM administrative systems and will include the following system modules:

- **Banner Finance System**

The scope of the Phase 1 Finance System for July 1 2010 Go Live Include:

- The Chart of Accounts (COA)
- Purchasing (P/O) and Paying (A/P) for Goods and Services, including decentralized requisitions for 4 departments. (Other Departments will be brought on after phase 1 Go live)
- Vendor Conversion/Migration
- Setup of Rules, Security and Approvals to support Fund Org security and requisitions for the departments above.
- Processing Journal Vouchers and Manual Encumbrances
- Daily Balancing and Reports, Month End Processing
- Research (Grant) Accounting
- Finance Self Service
- Interfaces and Banner Bridges to 3<sup>rd</sup> Party and Legacy systems as required.
- Evisions Intellicheck and Form Fusion

Following Phase 1, the following Finance modules and processes will Go Live incrementally as needed:

- Reconciling Bank Accounts and Cash Processing
- Processing Misc Cash Receipts and Non-Student A/R
- Managing Fixed Assets
- Salary Budget Role with HR
- Finance Budget Development
- Processing New Year

- **Banner Human Resources System**

- Biographic and Demographic
- Applicant Tracking
- Employee Management
- General Employee Tracking
- Employee Class Development
- Position Classification and Salary Structure
- Job Management
- Earnings
- Leave accrual
- Leave by employee

- Benefits and Deductions
- Tax Reporting
- Time Entry with Approvals
- Payroll Processing
- International Tracking
- Position Control and Salary Budgeting
- Salary Planner and Basic Salary Budget Processing
- Self-service for employees
- Self-service time entry
- Electronic Personnel Action Form
- Faculty administration
- FMLA
  
- Banner Student System
  - General
  - Catalog
  - Schedule
  - Recruiting
  - Admissions
  - Self-Service
  - Managing International Students and Visitors
  - Registration
  - Fee Assessment
  - Accounts Receivable
  - Academic History
  - Communication plan processing.
  - Faculty Load analysis rules
  
- Banner Financial Aid System
  - Record Creation
  - Dataload and EDE/CSS Processing
  - Need Analysis
  - Corrections Processing
  - Requirements Tracking
  - Transfer Monitoring
  - Budgeting
  - Funds Management
  - Student Employment
  - Packaging and Disbursement
  - Pell and COD Reporting
  - Electronic CommonLine /CommonRecord Loans
  - Return of Title IV Funds

- Student Self-Service (Financial Aid Portion)
- Common Functions: Batch Posting
- Common Functions: Holds
- Luminis Platform version 4.x
- Banner Operational Data Store (ODS) and Cognos Toolset (for Custom Reporting)
- Banner Workflow (for Key Process Improvement Automation)
- Banner Integration for eLearning with the Blackboard LMS

In connection with the above modules, as specified in the above referenced agreement, certain current and historical data from MSM's legacy systems will/will not (as specified in Appendix A) will be mapped and converted to the Banner system.

SGHE will deliver training and implementation support services, consulting services, and project management in accordance with the Software License and Services Agreement and Hosting Agreement outlined in Appendix A.

Specifically these SGHE services include:

- Project Management
- Product and Technical Consulting Services
- Application Training
- Data Conversion Planning
- Train the Trainer

A project budget has been defined, approved and managed for this implementation project. It is maintained by the MSM Project Management Team and Sponsor. Details and/or questions relating to the project budget should be directed to the Project Director.

## 5 Critical Success Factors

- To meet milestones successfully in order to obtain the go-live date with limited risks
- Staying within budget and on time for delivery
- Successful transition of the Banner system to MSM ownership
- Embracing the new system by the MSM end-users
- Successful initial training and knowledge transfer of staff on the new system, including a mechanism for on-going End-User training (after completion of the implementation project)
- Preservation of the accuracy of data throughout the conversion and implementation
- Complete and accurate project documentation in a shared location
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## 6 High Level Risk and Mitigations

| <b>Risk:</b>                                                                                                                 | <b>Mitigation:</b>                                                                                                                                                                                                                              |
|------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Lack of sufficient project team communications                                                                               | <ul style="list-style-type: none"> <li>Weekly team meetings and reports; accurate documentation; use of SharePoint</li> </ul>                                                                                                                   |
| Project Team personnel changes                                                                                               | <ul style="list-style-type: none"> <li>Designate alternates and documentation</li> </ul>                                                                                                                                                        |
| New / unknown requirements                                                                                                   | <ul style="list-style-type: none"> <li>Project leadership team will assess and communicate scope impacts to project using an integrated change management process</li> </ul>                                                                    |
| Shifts and/or changes in leadership may change project scope or priorities                                                   | <ul style="list-style-type: none"> <li>Project leadership team will assess and communicate scope impacts to project using an integrated change management process</li> </ul>                                                                    |
| Lack of full time MSM trainer                                                                                                | <ul style="list-style-type: none"> <li>Develop training strategy to leverage power users</li> <li>Leverage SGHE training staff</li> </ul>                                                                                                       |
| MSM staffing limitations                                                                                                     | <ul style="list-style-type: none"> <li>Project leadership team will assess and communicate resource impacts to project using an integrated change management process</li> <li>Leverage SGHE application and/or technical consultants</li> </ul> |
| User commitment of time fails to meet required level                                                                         | <ul style="list-style-type: none"> <li>Decisions will be pushed to MSM project leadership team</li> </ul>                                                                                                                                       |
| Work load/priorities for maintaining legacy system(s) increases                                                              | <ul style="list-style-type: none"> <li>Project leadership team will assess and communicate impacts to project</li> <li>Leverage SGHE application and/or technical consultants</li> </ul>                                                        |
| Lack of consensus or delay in decisions regarding user policies                                                              | <ul style="list-style-type: none"> <li>Escalation process established to move decisions to project leadership team and/or steering committee for resolution</li> </ul>                                                                          |
| Increased project funding needs                                                                                              | <ul style="list-style-type: none"> <li>Project steering committee and sponsors will review to assess cost impacts using an integrated change management process</li> </ul>                                                                      |
| Unplanned / unexpected workload additions such as legacy-system support, unplanned support activities (such as Audits), etc. | <ul style="list-style-type: none"> <li>Review of project schedules and workload to determine impact of unplanned activities on the project</li> </ul>                                                                                           |
|                                                                                                                              | <ul style="list-style-type: none"> <li></li> </ul>                                                                                                                                                                                              |

## 7 Assumptions, Constraints, and Dependencies

Assumptions, constraints and dependencies are items being presumed and are generally outside the control of the project. The following sections list at a high level, the project's assumptions, constraints and dependencies that are deemed to be true and accurate during the planning stage of the project. These will be updated periodically throughout the project lifecycle.

### 7.1 Assumptions

The project's assumptions are given below:

- MSM project resources will be given adequate time away from their day-to-day work to perform their project related assignments in a timely manner
- SunGard Higher Education and Morehouse School of Medicine will work in good faith to support one another throughout the implementation and its activities
- All services will be delivered in accordance with contractual commitments
- SunGard's WIN implementation methodologies will be followed throughout the implementation
- MSM leadership and or Institution initiatives will not adversely impact the project scope, priorities and/or resource allocations
- An integrated change control process will be instituted to manage scope creep and unforeseen changes to the initial project plans and objectives
- There is an approved budget for the project
- An escalation process will be instituted to manage the communication and decision making process for major issues
- Meaningful project milestones will be established to accurately measure the successes and/or failures of the project
- All SGHE components and technologies of the Banner solution will be integrated and functional to support MSM business processes

### 7.2 Constraints

Project constraints are aspects about the project that cannot be changed and are limiting in nature. Constraints generally surround four major areas: scope, cost, schedule (time), and resources.

- Morehouse School of Medicine's project budget must be managed and upheld; MSM project resources will be limited to approximately 75 % availability; project scope and/or timeline will be the most flexible of the constraints (within bounds of the contract)
- The technical skill required to maintain Banner may not be met with staff's current skill set; additional training, mentoring may be needed
- Availability and readiness of MSM staff responsible for interfacing with Banner (Banner Student data/business analysis, Banner Finance interfaces, etc.)
-

### 7.3 Dependencies

Deliverables from the project(s) defined below, either planned or currently underway, will be required to enable this project to meet its objectives.

- Supplemental training and/or skills development
- Banner system upgrades, patches, and subsequent releases up to go-live
- Initial creation of multiple Banner database instances and web sites for Conversion, Development, Testing, Training, and a Sandbox environment
- Acquisition and provisioning of new hardware
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## 8 Overall Implementation Schedule

The detailed implementation schedule is defined and maintained in the Schedule documents. The diagram below is a planning overview only.

| Year                                              | 2010 |     |     |     |     |     |     |     |     |     |     |     | 2011 |     |     |     |     |     |
|---------------------------------------------------|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|
| Month                                             | Jan  | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan  | Feb | Mar | Apr | May | Jun |
| Month Number                                      | 1    | 2   | 3   | 4   | 5   | 6   | 7   | 8   | 9   | 10  | 11  | 12  | 1    | 2   | 3   | 4   | 5   | 6   |
| Project Organization & Planning                   |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |
| Discovery                                         |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |
| UDC System Education / Knowledge Transfer         |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |
| Banner Configuration                              |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |
| Banner Finance                                    |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |
| Banner HR / Payroll                               |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |
| Banner Student                                    |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |
| Banner Financial Aid                              |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |
| Banner Workflow                                   |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |
| Luminis Portal                                    |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |
| ODS / Cognos                                      |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |
| -Banner eLearning Integration with Blackboard LMS |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |
| Data Conversion                                   |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |
| UDC Testing                                       |      |     |     |     |     |     |     |     |     |     |     |     |      |     |     |     |     |     |

Contract Term

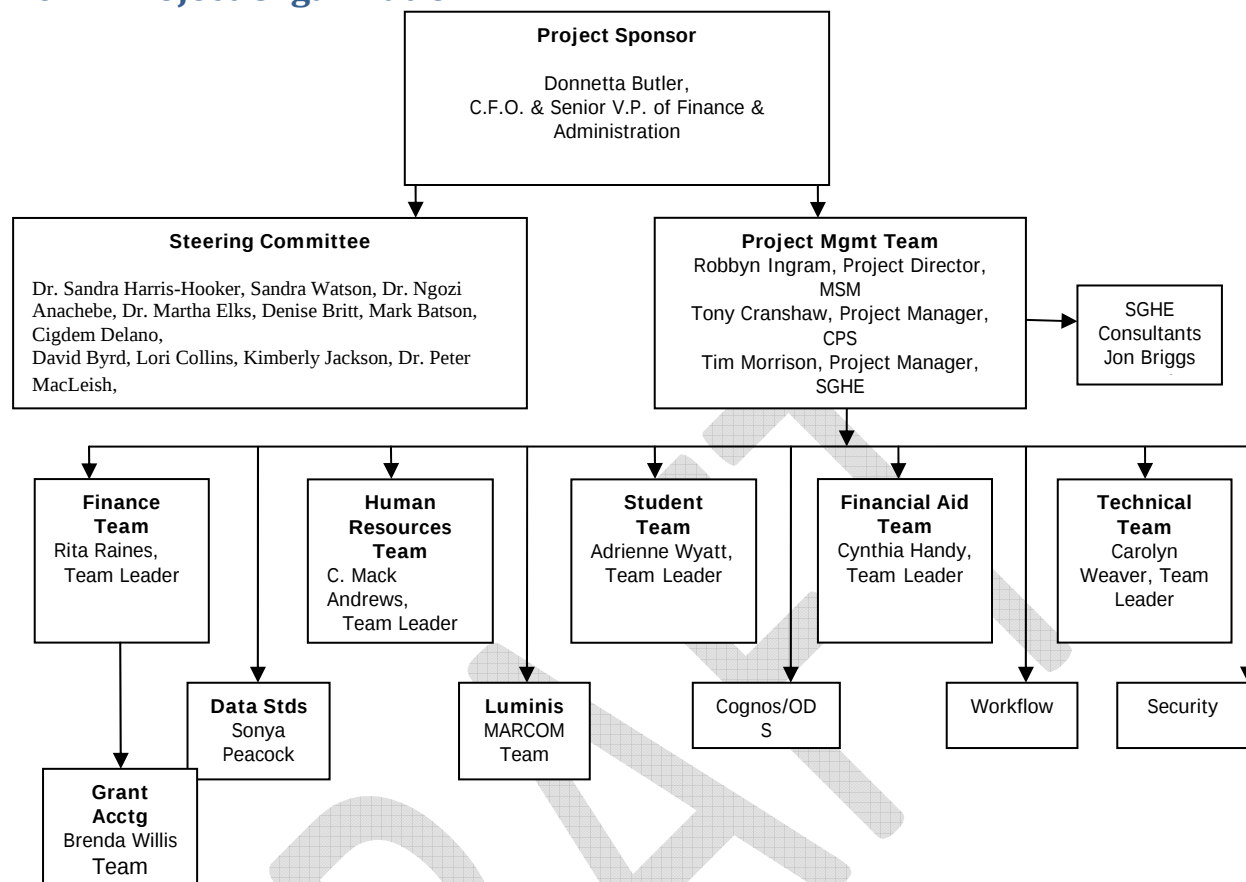
## 9 Quality

SunGard performs periodic customer satisfaction surveys that focus on the value of the SGHE services provided to clients.

SGHE has a quality assessment plan in place that will be conducted throughout the project. It is an internal assessment of the use of the Higher Ground methodology and processes. An improvement / action plan will be initiated to remediate any systemic issues or problems uncovered.

Further, if MSM has specific concerns about service quality or deliverables, the project structure is designed to elevate issues or concerns to SGHE Project Sponsors and Stakeholders.

## 10 Project Organization



| Role                     | Individuals                                                                               | Major Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|--------------------------|-------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Executive Sponsor</b> | <b>Donnetta Butler</b> – Chief Financial Officer, Senior Vice President of Administration | <p><b><i>The Executive Sponsor has the ultimate responsibility for the success of the project.</i></b></p> <ul style="list-style-type: none"> <li>Leads the Steering Committee</li> <li>Serves as the ultimate decision maker for issues that are unable to be solved at the other levels of the project organization</li> <li>Works closely with the Executive Steering Committee to facilitate decision-making and issues resolution with regard to policy, process, business practices, and institutional culture when needed</li> <li>Represents the project and champion the project at the highest levels of MSM governance</li> <li>Provides guidance, resources, and help to navigate the politics of an institution-wide ERP implementation</li> <li>Receives reports directly from the Project Director</li> </ul> |
| <b>Project Director</b>  | <b>Robbyn Ingram</b> – MSM Project Director, ETP                                          | <p><b><i>The Project Director will work with the Project Management Support Team to ensure the success of the project during the implementation</i></b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

| Role                      | Individuals                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Major Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <p><i>period. The Project Director is the main point of contact between the MSM Project Sponsor, the PM Support Team and MSM Implementation Team to lead decision-making and issues resolution with regard to MSM policy, process, business practices, institutional culture and all other elements necessary to the success of the project</i></p> <ul style="list-style-type: none"> <li>▪ The Project Director provides leadership in the day-to-day management of the project.</li> <li>▪ Leads, secures, and monitors all resources dedicated to the project and lead project communications within MSM</li> <li>▪ Coordinate decision making process so that all departments receive adequate consideration</li> <li>▪ Monitor project status and issues</li> <li>▪ Ensure that all tasks and deliverables in the project are completed on time and budget</li> <li>▪ Takes responsibility for the review and distribution of the SGHE MSM project Activities Calendar to MSM Team leaders</li> <li>▪ Ensures that the communication plan executed</li> <li>▪ Acts as the primary contact and manager of project vendors</li> <li>▪ Monitors the project budget with the support of CPS Project Manager</li> <li>▪ Manages Project Change Management</li> <li>▪ Leads MSM Organizational Readiness</li> <li>▪ Recommend adding or removing MSM team members and/or team leaders</li> <li>▪ Lead project communications with the MSM community</li> <li>▪ Maintain and Monitor the project repository on SharePoint</li> </ul> |
| <b>Steering Committee</b> | <p><b>Dr. Sandra Harris-Hooker</b> – Interim Dean<br/> <b>Sandra Watson</b> – Asst VP for Finance &amp; Associate Dean for Administration<br/> <b>Dr. Ngozi Anachebe</b> – Asst. Dean for Student Affairs<br/> <b>Dr. Martha Elks</b> – Sr. Assoc. Dean for Ed / Faculty Affairs<br/> <b>Denise Britt</b> – Assoc. VP of Human Resources<br/> <b>Mark Batson</b> – MMA Executive Director<br/> <b>David Byrd</b> - Comptroller<br/> <b>Lori Collins</b> – Chief Compliance Officer<br/> <b>Kimberly Jackson</b> – Chief of Staff<br/> <b>Peter MacLeish</b> – Chr &amp; Prof.,</p> | <ul style="list-style-type: none"> <li>▪ Provides high-level direction and leadership for the project</li> <li>▪ Defines and reinforces guiding principles that shape the decision making process</li> <li>▪ Approves major changes to scope, timeline or budget</li> <li>▪ Resolves major policy or business practice issues (as needed)</li> <li>▪ Supports project communication and institutional culture change</li> <li>▪ Promotes buy-in on the part of MSM community</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

| Role                        | Individuals                                                                                                                                                                                               | Major Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                             | Neurobiology<br><b>Sally Davis</b> – V.P. for OIA/MARCOM<br><b>Patrick Thomas</b> – Sr. Dept. Administrator<br><b>Cigdem Delano</b> – Chief Information Officer<br><b>Rene Morrow</b> – Senior Dept Admin |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>CPS Project Manager</b>  | <b>Tony Cranshaw, PMP</b>                                                                                                                                                                                 | <ul style="list-style-type: none"> <li>▪ Provides direct support to the MSM Project Sponsor, the MSM Project Director and MSM Project Team Leaders</li> <li>▪ Provides overall project leadership, guidance, day to day management and support to all Project Team Leaders and MSM Project Director</li> <li>▪ Collaborate with MSM and SGHE throughout the implementation to maintain and update project plans and related documentation</li> <li>▪ Facilitate the development and refinement of dependency-driven implementation project schedules for all phases of the implementation in partnership with MSM and SGHE</li> <li>▪ Determines and assigns MSM Project (Team Leads) Resources to tasks in implementation schedules</li> <li>▪ Perform weekly tracking and reporting of MSM tasks and project milestones using implementation project schedules</li> <li>▪ Establishes project management process and tools</li> <li>▪ Monitor Project Information in MSM SharePoint Environment</li> <li>▪ Prepares and delivers monthly project status reports for all MSM project stakeholders</li> <li>▪ Prepares weekly flash reports for MSM project Team Leaders and Sponsor</li> <li>▪ Manages, track and report overall Project Budget</li> <li>▪ Ensures all tasks and deliverables in the project are completed on time and budget</li> <li>▪ Manages issues related to the overall project</li> <li>▪ Provides management and support for project scope change management</li> <li>▪ Maintain Project Contact Sheet for all Project Key Stakeholders</li> </ul> |
| <b>SGHE Project Manager</b> | <b>Tim Morrison, PMP</b>                                                                                                                                                                                  | <b>**THIS SECTION TO BE EDITED BY Tim**</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

| Role                              | Individuals                                                                                                                                                                                           | Major Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Project Management Team</b>    | <b>Robbyn Ingram – MSM Project Director ETP</b><br><b>Tony Cranshaw, Collegiate Project Services (CPS) – Project Manager</b><br><b>Tim Morrison, SunGard Higher Education (SGHE)- Project Manager</b> | <p><i><b>The PM Support Team is comprised of Project Managers from CPS, and SGHE. The main objective of the PM Support Team is schedule, track and control the MSM and SGHE tasks that will be carried out over the life of the project. The PM Support Team will work to facilitate open communication and proactive issue resolution, and provide support and guidance to the Project Team throughout the project. The PM Support team will coordinate its collective assets and expertise to the benefit of the project.</b></i></p> <ul style="list-style-type: none"> <li>▪ Provides direct support to the Project Sponsor and the MSM Project Director</li> <li>▪ Provides overall project leadership, guidance and support to all Project Stakeholders</li> <li>▪ Monitors and track the completion of MSM and SGHE tasks and Milestones</li> <li>▪ Establishes project plans, schedule, project management methodology and tools</li> <li>▪ Updates and controls the project schedule</li> <li>▪ Determines and assigns Project Resources</li> <li>▪ Reports Overall Project Status to all Project Stakeholders</li> <li>▪ Monitors project status, risks and issues</li> <li>▪ Escalates issues related to slippage of project schedules</li> <li>▪ Ensures all tasks and deliverables in the project are completed on time and budget</li> <li>▪ Resolves issues related to project execution</li> <li>▪ Supports effective communication among all levels of the implementation team</li> <li>▪ Monitors and Tracks Project Budget</li> <li>▪ Manages Overall Project Change Management</li> </ul> |
| <b>Banner Implementation Team</b> | Project Director<br>Project Managers<br>Functional/Technical Team Leaders                                                                                                                             | <p><i><b>The Banner Implementation Team provides leadership at the Functional, Technical and Project Management levels for the implementation of Banner and other auxiliary systems. Specific responsibilities include:</b></i></p> <ul style="list-style-type: none"> <li>▪ Provide leadership in making and resolving implementation decisions that impact multiple functional areas and systems.</li> <li>▪ Responsible for the review and distribution of the SGHE MSM project Activities Calendar to MSM Project Team Members</li> <li>▪ Conduct regular review of project implementation status across key processes to understand dependencies among</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

| Role                                                        | Individuals                                                                                                                                           | Major Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                             |                                                                                                                                                       | <p>functional areas and to resolve issues and make decisions as needed</p> <ul style="list-style-type: none"> <li>Review project status in terms of individual functional areas and/or milestones</li> <li>Review the communication plan to ensure that project progress is appropriately communicated to the MSM community and to identify communication concerns</li> <li>Establishes Cross functional Implementation Work Teams as Required</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Functional Team Lead – Banner Human Resources System</b> | <p><b>Constance Mack-Andrews</b> – Manager, HR Talent &amp; Change Management</p> <p>Team Lead Back-up<br/><b>Marsha Salter</b> – Payroll Manager</p> | <p><b><i>Functional team leads are responsible for the successful implementation of their System area included in the Project scope. They are responsible for making decisions and ensuring that necessary work is complete. Specific responsibilities include:</i></b></p> <ul style="list-style-type: none"> <li>Communicate implementation status of their functional area to Project Mgt Team</li> <li>Work directly with the SGHE consultants to assign responsibility/tasks to functional staff and ensure work is done in a timely manner to preclude slippage in schedules</li> <li>Establish work teams as required across module and process areas</li> <li>Schedule MSM facilities for trainings, consultant visits and key project meetings</li> <li>Provide leadership in implementation decisions</li> <li>Ensure reporting requirements are met</li> <li>Ensure Data Conversion Integrity and Validation is completed</li> <li>Develop training plans and ensure end-user training is delivered</li> <li>Develop testing plans and ensure system testing and validation is completed</li> <li>Obtain Security Access Requirements within their area</li> <li>Develop and distribute Implementation session minutes</li> </ul> |
| <b>Human Resources Key Functional Team Members</b>          | Sandra Watson, Shalisha Watson, Rhona Joyner, Renee Dunbar-Scott                                                                                      | <p><b><i>The Functional Team Members are responsible to learn the software and tools, actively participate in the System Training, decision-making, and for getting the work done within their Work Team. Specific responsibilities include:</i></b></p> <ul style="list-style-type: none"> <li>Prepare for SGHE HR training and consulting sessions</li> <li>Attend SGHE System Education and Consulting sessions</li> <li>Perform detailed work plans for each functional module</li> <li>Ensure that the system is developed to best serve the needs of MSM</li> <li>Develop test procedures and perform</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

| Role                                                | Individuals                                                                                                                                                                                                                                                                                                                                                                      | Major Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                     |                                                                                                                                                                                                                                                                                                                                                                                  | <ul style="list-style-type: none"> <li>system testing</li> <li>Populate system with MSM data as needed</li> <li>Perform MSM Data Conversion and Migration Validation</li> <li>Deliver End-user Training</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Functional Team Lead – Banner Finance System</b> | <p><b>Rita Raines</b> – Finance Project Director</p> <p><b>Finance Team Lead Backup- Brenda Willis</b> – Dir. of Grants &amp; Contracts</p>                                                                                                                                                                                                                                      | <p><b>Functional team leads are responsible for the successful implementation of their System Area included in the Project scope. They are responsible for making decisions and ensuring that necessary work is complete. Specific responsibilities include:</b></p> <ul style="list-style-type: none"> <li>Communicate implementation status of their functional area to Project Mgt Team</li> <li>Work directly with the SGHE consultants to assign responsibility/tasks to functional staff and ensure work is done in a timely manner to preclude slippage in schedules</li> <li>Establish work teams as required across module and process areas</li> <li>Provide leadership in implementation decisions</li> <li>Ensure reporting requirements are met</li> <li>Ensure Data Conversion Integrity and Validation is completed</li> <li>Develop training plans and ensure end-user training is delivered</li> <li>Develop testing plans and ensure system testing and validation is completed</li> <li>Obtain Security Access Requirements within their area</li> <li>Develop and distribute Implementation session minutes</li> </ul> |
| <b>Finance Key Functional Team Members</b>          | <p>David Byrd, Brenda Willis, Bridgett Martin-Mack, Lois Wiggins, Carolyn Blunt, Linwood Hilton, Mike Partain, Waverly McMichael, Patrick Thomas, Sandra Watson, Marsha Salter, Constance Mack-Andrews, Trina Shelton, Favia Berry, Jawaun Hicks, Shannon, Jafolis, Melissa Hart; Andrea Fox</p> <p><b>Optional Members (when needed):</b><br/>Donnetta Butler, Sonja Warner</p> | <p><b>The Functional Team Members are responsible to learn the software and tools, actively participate in the System Training, decision-making, and for getting the work done within their Work Team. Specific responsibilities include:</b></p> <ul style="list-style-type: none"> <li>Prepare for SGHE training and consulting sessions</li> <li>Attend SGHE System Education and Consulting sessions</li> <li>Perform detailed work plans for each functional module</li> <li>Ensure that the system is developed to best serve the needs of MSM</li> <li>Develop test procedures and perform system testing</li> <li>Populate system with MSM data as needed</li> <li>Perform MSM Data Conversion and Migration Validation</li> <li>Deliver End-user Training</li> </ul>                                                                                                                                                                                                                                                                                                                                                              |

| Role                                         | Individuals                                                                                                                                                                                                                   | Major Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Functional Team Lead – Banner Student System | Adrienne Wyatt - Registrar<br><br>Team Lead Backup-                                                                                                                                                                           | <p><b>Functional team leads are responsible for the successful implementation of their included in the scope. They are responsible for making decisions and ensuring that necessary work is complete. Specific responsibilities include:</b></p> <ul style="list-style-type: none"> <li>Communicate implementation status of their functional area to Project Mgt Team</li> <li>Work directly with the SGHE consultants to assign responsibility/tasks to functional staff and ensure work is done in a timely manner to preclude slippage in schedules</li> <li>Establish work teams as required across module and process areas</li> <li>Provide leadership in implementation decisions</li> <li>Ensure reporting requirements are met</li> <li>Ensure Data Conversion Integrity and Validation is completed</li> <li>Develop training plans and ensure end-user training is delivered</li> <li>Develop testing plans and ensure system testing and validation is completed</li> <li>Obtain Security Access Requirements within their area</li> <li>Develop and distribute Implementation session minutes</li> </ul> |
| Student Key Functional Team Members          | Carma Adams, Jasmin Bland, Dr. Martha Elks, Chandra Flowers, Dr. Shawn Garrison, Nicole George, Cynthia Handy, Jamillah McDaniel, Dr. Douglas Paulsen, Dr. Sterling Roaf, Dr. Patricia Rodney, Kim Sanders, Jacqueline Scott, | <p><b>The Functional Team Members are responsible to learn the software and tools, actively participate in the decision-making, and for getting the work done. Specific responsibilities include:</b></p> <ul style="list-style-type: none"> <li>Prepare for SGHE training and consulting sessions</li> <li>Attend SGHE System Education and Consulting sessions</li> <li>Perform detailed work plans for each functional module</li> <li>Ensure that the system is developed to best serve the needs of MSM</li> <li>Develop test procedures and perform system testing</li> <li>Populate system with MSM data as needed</li> <li>Perform MSM Data Conversion and Migration Validation</li> <li>Deliver End-user Training</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                  |
| Functional Team Lead – Financial Aid System  | Cynthia Handy – Dir. Student Fiscal Affairs<br><br>Team Lead Backup-<br>Chandra Flowers – Financial Aid Coordinator                                                                                                           | <p><b>Functional team leads are responsible for the successful implementation of their included in the scope. They are responsible for making decisions and ensuring that necessary work is complete. Specific responsibilities include:</b></p> <ul style="list-style-type: none"> <li>Communicate implementation status of their functional area to Project Mgt Team</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

| Role                                             | Individuals                                        | Major Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|--------------------------------------------------|----------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                  |                                                    | <ul style="list-style-type: none"> <li>Work directly with the SGHE consultants to assign responsibility/tasks to functional staff and ensure work is done in a timely manner to preclude slippage in schedules</li> <li>Establish work teams as required across module and process areas</li> <li>Provide leadership in implementation decisions</li> <li>Ensure reporting requirements are met</li> <li>Ensure Data Conversion Integrity and Validation is completed</li> <li>Develop training plans and ensure end-user training is delivered</li> <li>Develop testing plans and ensure system testing and validation is completed</li> <li>Obtain Security Access Requirements within their area</li> <li>Develop and distribute Implementation session minutes</li> </ul> |
| <b>Financial Aid Key Functional Team Members</b> | Sandra Parham, Chandra Flowers, Derreck Pressley   | <p><b><i>The Functional Team Members are responsible to learn the software and tools, actively participate in the System Education Training, decision-making, and for getting the work done. Specific responsibilities include:</i></b></p> <ul style="list-style-type: none"> <li>Prepare for SGHE training and consulting sessions</li> <li>Attend SGHE System Education and Consulting sessions</li> <li>Perform detailed work plans for each functional module</li> <li>Ensure that the system is developed to best serve the needs of MSM</li> <li>Develop test procedures and perform system testing</li> <li>Populate system with MSM data as needed</li> <li>Perform MSM Data Conversion and Migration Validation</li> </ul>                                          |
| <b>Technical Team Lead</b>                       | <b>Carolyn Weaver</b> – Dir. Information Solutions | <p><b><i>The Technical Team lead is responsible for coordinating and guiding the technical support requirements for the successful implementation of all ERP modules. Specific responsibilities include:</i></b></p> <ul style="list-style-type: none"> <li>Oversee project technical staff – reporting, interfaces, data conversion</li> <li>Ensure that tasks owned by the Technical Team are completed in a timely manner to preclude slippage in the project schedules.</li> <li>Coordinate with the Project Director to secure contract resources, if needed</li> <li>Support the PM Team as needed</li> <li>Coordinate Technical Tasks, serving as the primary point of contact with the SGHE Technical Team and Infrastructure Managed</li> </ul>                      |

| Role                                                       | Individuals                                                                                                                                                                                                                  | Major Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                            |                                                                                                                                                                                                                              | Services Team                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Technical Key Functional Team Members</b>               | Dornisha Beaner, Tatiana Kabakova, Mike Partain                                                                                                                                                                              | <p><b><i>The Functional Team Members are responsible to learn the software and tools, actively participate in the decision-making, and for getting the work done. Specific responsibilities include:</i></b></p> <ul style="list-style-type: none"> <li>▪ Prepare for SGHE training and consulting sessions</li> <li>▪ Attend SGHE Technical and Functional System Education and Consulting sessions</li> <li>▪ Perform required technical tasks in support of each functional module</li> <li>▪ Ensure that the system is developed to best serve the needs of MSM</li> <li>▪ Support MSM Functional Teams as needed for Technical Support including Security, Administration, Reporting etc as needed</li> <li>▪ Develop Banner to Legacy System Interfaces as needed</li> <li>▪ Perform MSM Legacy Data Extraction and Support Migration Validation in support of Overall Data Conversion</li> </ul> |
| <b>SunGard Higher Education Implementation Consultants</b> | Jon Briggs – HR and Win Team Leader<br>Evonne Walters – Finance<br>Virginia Green - Student<br>Cheryl Marcotte - Financial Aid<br>Laurene Farley – Technical<br>D. Douglas/K.Goethe - Luminis<br>TBD - Workflow<br>TBD - ODS | <p><b><i>The SGHE Implementation Consultants are responsible for implementing the Core Banner ERP system and auxiliary UDC component systems (Luminis, ODS). The Process and responsibilities include:</i></b></p> <ul style="list-style-type: none"> <li>▪ Understanding current MSM business Processes to Identify gaps with core Banner Processes</li> <li>▪ Configuring Banner systems to meet MSM processing needs within the WIN Methodology</li> <li>▪ Converting and Migrating MSM legacy data to Banner</li> <li>▪ Providing system education and training to MSM Key Team Members</li> <li>▪ Transitioning MSM to Banner in supporting each System Go Live to Production</li> </ul>                                                                                                                                                                                                           |

## 11 Key Milestones \*

| Key Milestone                               | Start Date     | Go-Live Date  | End Date   |
|---------------------------------------------|----------------|---------------|------------|
| Project Kick-off                            | January, 2010  |               | July, 2011 |
| Environment Established                     | March, 2010    |               |            |
| Banner Finance – Phase-1                    | January, 2010  | July, 2010    | July, 2011 |
| Banner Human Resources / Payroll            | February, 2010 | January, 2011 | July, 2011 |
| Luminis Portal                              | April, 2010    | November 2010 |            |
| Banner Student                              | March 2010     | March 2011    |            |
| Banner Financial Aid                        | March 2010     | February 2011 |            |
| ODS / Cognos                                | August 2010    | October 2010  |            |
| WorkFlow                                    |                |               |            |
| Banner Integration for eLearning Blackboard | May 2011       | June 2011     |            |
|                                             |                |               |            |

\* These milestone dates are estimates prior to more detailed information gathering and planning. The official milestones will be kept with the project schedule where they will be maintained change control.

## Appendix A: Detailed Project Scope

MSM's ultimate goal is to attain production operations in a timeline structured by the high level project schedule for the following areas:

### ***Banner General System***

The components of the Banner General System that are in scope and will be configured during the Win implementation include:

- Letter Generation
- Population Selection

The components of the Banner General System that are out of scope and will not be configured include:

- Banner Reports
- Quickflows
- Object:Access and GTVSDAX
- Role-Based Security
- Value-Based Security
- Event Management
- Self Service PIN Administration
- Web Tailor modifications of Banner Self Service

### ***Banner Student System***

The components of the Banner Student System that are in scope and will be configured during the Win implementation include:

- General
- Catalog
- Schedule
- Recruiting
- Admissions
- Self-Service
- Managing International Students and Visitors
- Registration
- Fee Assessment
- Accounts Receivable
- Academic History

Training, but no configuration for the following is included in this scope of work:

- Communication plan processing.

- Faculty Load analysis rules

Configuration for the following is not included in this scope of work:

- Student support services
- Continuing education (non-credit, workforce training, and/or CEUs)
- Open learning registration
- Curriculum, Advising, and Program Planning (CAPP)
- Electronic Data Interchange (EDI)

### ***Banner Financial Aid System***

The components of the Banner Financial Aid System that are in scope and will be configured during the Win implementation include:

- Record Creation
- Dataload and EDE/CSS Processing
- Need Analysis
- Corrections Processing
- Requirements Tracking
- Transfer Monitoring
- Budgeting
- Funds Management
- Student Employment
- Packaging and Disbursement
- Pell and COD Reporting
- Electronic CommonLine/CommonRecord Loans
- Return of Title IV Funds
- Student Self-Service (Financial Aid Portion)
- Common Functions: Batch Posting
- Common Functions: Holds

Configuration for the following is not included in this Scope of Services; however, where indicated, training will be provided.

- Award History
- Common Functions: New Year Roll
- Common Functions: Satisfactory Academic Progress (Client specific SAP Rules will not be configured, but training on how to establish SAP rules will be included within this scope of work.)
- Common Functions: User-Defined Fields
- Common Functions: FISAP. (Training will be conducted on how to generate the FISAP report, but no customer-specified configuration will be provided.)
- Student System Shared Data
- Configuration of Institutional Methodology Need Analysis

- Term-Based Budgeting
- Term-Based Packaging
- Clock Hour Functionality
- Multi-Institutional Functionality
- Short-Term Credit
- Borrower-Based Loans (Training will be conducted on how to process Borrower-Based loans if applicable, but no customer-specified configuration of these type of loans will be provided.)

### ***Banner Finance System***

The core components of the Banner Finance System that are in scope and will be configured during the Win implementation include:

- Chart of Accounts
- Purchasing
- Bank Reconciliation
- Rules
- Security
- Approvals (limited to 3 approval queues)
- Accounts Payable
- Fixed Assets
- Non Student Accounts Receivable
- Self-Service

Configuration of the following is not included in this scope of work:

- P-Card
- Bid Processing
- Finance Budget and Position Control Budget Development
- Endowment Management
- Research Proposals
- Research Accounting
- Research Billing
- Cost Accounting
- Stores Inventory
- Interfaces to non-Banner systems
- Banner Chart Attributes
- Year-End
- GASB Reporting
- Endowment Management
- EDI Processing

### ***Banner Human Resources System***

The core components of the Banner Human Resources System that are in scope and will be configured during the Win implementation include:

- Biographic and Demographic
- Applicant Tracking
- Employee Management
- General Employee Tracking
- Employee Class Development
- Position Classification and Salary Structure
- Job Management
- Earnings
- Leave accrual
- Leave by employee
- Benefits and Deductions
- Tax Reporting
- Time Entry with Approvals
- Payroll Processing
- International Tracking
- Position Control and Salary Budgeting
- Salary Planner and Basic Salary Budget Processing
- Self-service for employees
- Self-service time entry
- Electronic Personnel Action Form
- Faculty administration
- FMLA

Configuration of the following is not included in this scope of work:

- Human resources security
- Position requisitions creation
- Person experience tracking
- Skills tracking
- Development of EPAFs and timesheet routing processes. Client specific EPAFs and Timesheet routing is not supported in this scope of services. Training will be conducted on how to submit EPAFs and how to appropriately control the routing of Timesheets within the Banner Self Service product
- On-going management of position control changes. These changes will be maintained by Licensee in a pre-production instance of Banner
- Salary encumbrance processing
- Flexible spending account balance tracking
- Employee relations relating to labor relations, grievances, and bargaining unit tracking
- Health and safety processing configuration
- Faculty load for compensation purposes

- Specialized salary planner configuration requests
- Flex benefit cafeteria plan
- Flex spending tracking
- Beneficiary tracking
- Committee and service tracking for human resources purposes
- Employee medical accommodation tracking configuration
- Fringe budgeting
- One time pay processing
- COBRA

### ***Data Migration***

Data Migration Services associated with the Win methodology are designed to provide the functionality required in order to have a working Banner/Oracle system/environment. Only the data identified as “active” data will be included as part of the standard conversion process. SunGard Higher Education’s Data Migration Services will be provided in the following phases:

- Migration Assessment and Planning
- Data Collection
- Initial Conversion Testing and Crosswalk Identification
- Pre-Production Conversion, Testing, and Certification
- Production Data Migration

### **Win Person and Non-Person Conversion**

Win person and non-person conversion may include:

- Names and IDs.
- Addresses.
- Telephone numbers.
- E-mail addresses.
- Comments.
- Biographic/demographic data (persons only).
- Holds (person only).
- Medical conditions (persons only).
- Emergency contacts (persons only).
- Personal relationships (persons only).
- Current visa information (for international students, faculty and employees).

### **Win Student-System Data**

Win Student-System Data is limited to:

- Course Catalog
- Course Schedule
- Faculty Load
- Location Management
- Recruits/Prospects
- Admissions
- General Student
- Registration
- Academic History
- Accounts

Win Student conversion excludes:

- Historical visa and other international information.
- Historical recruiting and admission records.
- Historical term class schedules.
- Historical enrollment verification requests.
- Historical transcript requests.

### **Win Financial Aid Conversion**

Win Financial Aid conversion is not supported

### **Win Finance Conversion**

Win Finance conversion may include:

- Vendor information.
- General Ledger Module
- Purchasing Module
- Accounts Payable Module
- Non-Student Accounts Receivable Module.

Win Finance conversion excludes:

- Fixed Assets Module.
- Cost Accounting Module.
- Stores Inventory Module.
- Rule codes.
- Approvals.
- Financial managers.
- Purchase orders.
- Endowment information.

- Research accounting and billing conversion.
- Interface design.

### **Win Human Resources Conversion**

Win Human Resources conversion may include:

- General Person Data
- Employee Administration Module
- Position Control/Jobs Module
- Benefits/Deductions Module
- Leave Accrual Information (vacation, sick, personal leave types)
- Payroll Administration Module

Win Human Resources conversion excludes:

- Conversion of beneficiary and dependent records.
- Conversion of applicant records.
- Historical information such as position history, employee history, salary history.
- Conversion of health and safety records.
- Conversion of employment relations data, labor unions, seniority tracking, grievances.
- Conversion of Flex spending accounts.
- Conversion of FMLA.
- Conversion of reviews.
- Conversion of general information such as education experience, terminal degree and publications.
- Conversion of retro pay records.
- Conversion of one-time payments.
- Conversion of position requisition records.
- Conversion of employee medical accommodation records.
- Employee International records.
- Conversion of COBRA records.
- Conversion of faculty tracking records such as tenure, appointment, promotion and sabbatical leave.
- Conversion of faculty load processing for compensation purposes..

## Approval of Project Charter

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Donnetta Butler  
Chief Financial Officer,  
Senior V.P. of Finance & Administration

Date

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Linda Morrisson  
General Manager, SGHE

Date

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Robbyn Ingram  
Project Director

Date

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John Neita  
Account Manager, SGHE

Date

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Tony Cranshaw  
Project Manager, Collegiate Project Services

Date

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Tim Morrison  
Project Manager, SGHE

Date

## Version Control/Revision History

| Version | Date   | Author  | Notes:                  |
|---------|--------|---------|-------------------------|
| 1.0     | 4/7/10 | PM Team | Draft Document Revision |
|         |        |         |                         |
|         |        |         |                         |