

The grass is always greener...

OIR Banner Implementation
Similarities and Differences at Two Neighboring Institutions



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Brief History...



Migrated from SCT Plus to SGHE Banner with ODS/EDW and Cognos Reporting Tool

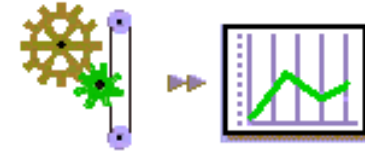
College of Charleston:

- FRS (Finance) Live July 2009
- FAM (Financial Aid) Live June 2010
- HRS (Human Res.) Live January 2010
- SIS (Student)
 - Admissions Live October 2010
 - Accts. Receivable Live June 2010
 - Registration Live April 2010
- ODS Live with Each Module

The Citadel:

- FRS (Finance) Live July 2009
- FAM (Financial Aid) Live March 2010
- HRS (Human Res.) Live April 2010
- SIS (Student)
 - Admissions Live October 2009
 - Accts. Receivable Live April 2010
 - Registration Live June 2010
- ODS and EDW Live with Each Module
- Cadet Info. System Overhaul

Legacy Reporting Structure



College of Charleston:

- Only IR and IT programmers wrote extracts/reports.
- CHEMIS extracts written/maintained by IT.
- No distributed reporting per se.
- IR used FOCUS and ODBC connection to transaction database and SAS. IT used COBOL and FOCUS.

The Citadel:

- Only IR and IT analysts wrote extracts/reports.
- CHEMIS extracts written/maintained by IR.
- Functional users could write simple reports and run reports from menus.
- IR used FOCUS to write extracts/reports out of transaction database.

Banner Reporting Structure



- Long Term Strategy:
 - Functional users (Registrar, Admissions, etc.) write simple reports using Excel/Cognos and ODS. IT analysts will support their functional users by writing complex reports using Cognos and ODS. Other campus areas will run routine reports with Cognos.
- Short Term Strategy:
 - Functional users write simple reports using Excel and ODS. Complex reporting jointly managed out of IR/IT with IR using Cognos and ODS and IT analysts using SQL and Banner transaction database.
- IR has “joint custody” of the ODS/EDW and Cognos with IT.
 - Technical responsibilities (patches, updates, etc.) belong to IT.
 - Functional responsibilities (custom ODS views, Cognos administrator, etc.) belong to IR.
- IR teaches Cognos and holds help sessions 2 afternoons each week for IT and functional users. We will transition into monthly “Conquering Cognos” workshops.
- IR has created custom ODS views for CHEMIS reporting as well as race/ethnicity reporting.

Growing Pains



- Reporting/data extraction had a low/no priority with IT and functional offices during the implementation process.
- IT culture change of “joint custody” of ODS/EDW and Cognos with IR.
- Managing campus expectations of reporting.
- Additional responsibilities placed on IR.
- Teaching functional users Excel and Cognos.
- Learning curve.
- Juggling requirements of day to day IR operations with the project implementation.
- Time.

End Results



- With IR assistance, most of the campus operational reporting is being accomplished.
- Cognos has a phenomenal capacity for reporting.
- ODS custom views have been created for CHEMIS reporting.
- Historical CHEMIS data is being uploaded for longitudinal reporting.
- IR office has expanded and gained excellent staff.

Lessons Learned



- Consistency of ODS/EDW SunGard consultants.
- Timing of SunGard training.
- Inclusion of IT analysts in ODS/EDW and Cognos training to support their functional users in report writing should be mandatory.
- Each functional office dedicate at least one individual to learn ODS, EDW and Cognos.
- IR representation on Banner Team Lead meetings and on ALL Banner implementation teams.
- Attend Banner functional area training when possible.
- Have both long-term and short-term strategies for reporting.
- Have an open mind.

What the future holds...



- Upload historic CHEMIS data to ODS for longitudinal reporting.
- Learn the EDW.
- Cadet information system data upload to ODS.
- Continue educating IT analysts and functional users on ODS/EDW and Cognos.
- Implementation of Banner Relationship module with dashboards.
- Continuous learning...

Banner Reporting Structure

- Campus-wide distributed reporting managed out of IT with report writers using Cognos and ODS out of the box. IT programmers no longer write any reports. IT manages a “Reporting Team” with varied levels of report-writers.
- IR has “special” ODBC access to transaction and ODS databases.
- IR now maintains code for all CHEMIS reporting using ODBC access and SAS/SQL.
- IR writes all data integrity reporting related to cleansing data for CHEMIS files and other mandated extracts.
- IR writes ad hoc reports when Cognos can’t be used

Growing Pains

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- IT controlled ODS and data warehouse – IR has no autonomy over designing/building views or schema.
 - IT staffing shortages – huge backlog of ODS customizations
 - Distributed reporting not working well – functional areas are busy enough getting Banner working and maintaining data – leaving very little time for reporting
 - Data integrity suffered greatly...does anyone outside of IR care about clean data?
 - Staffing
 - Time

End Results

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- IR has built and maintained it's own "mini" data warehouse
 - IR comes to the rescue. With ODBC access and SAS, IR has much more flexibility than functional users confined to Cognos.
 - IR plays a much larger role in Banner implementation and business process redesign to ensure and protect IR's ability to report from Banner data (i.e. how do you define a first-time freshman)
 - IR directs data standards for general Banner shared tables
 - IR uses ODBC access to validate data that is loaded from legacy into Banner through conversions
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Lessons Learned

- It is mission critical for an IR office implementing Banner to have:
 - ODBC access (to at least an ODS database.)
 - SQL training for all IR staff who will write queries
 - Robust tool to pull together extracts (SAS/SPSS/Access)
- IR representation on Banner implementation teams
- Attendance to Banner consultation visits – meant for functional areas but it makes a huge difference to be included as early as possible when building tables/codes (P.S. SGHE consultants don't know everything)
- Management or heavy involvement in campus-wide data standards

What the future holds...

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- Building metadata of extract files so that a dictionary of Banner fields used by IR can be published (users shouldn't edit fields without at least an FYI to IR)
 - ODS customizations completed so that IR reporting can be shifted to Cognos and EDW implementation can begin
 - ODS customized for historical CHEMIS data to be uploaded for trend reporting.
 - Continuous learning...monitoring...tweaking...

Opportunities....

State-wide Banner collaboration



Executive Committee:

President - Chip Nimmich (Citadel)

Vice President - Robin Lawrence (Lander)

Treasurer - Glenn Savage (Winthrop)

Secretary - Mike Brown (USC)

Charter Board Members from Central Carolina Tech, College of Charleston, Piedmont Tech, Presbyterian College, SC State University and Wofford College

SCBUG web page is in development to be located within SunGard Commons (<http://www.edu1world.org/CommonsSunGardHE/>).
Planning a SCBUG Summit in October of 2011.

Opportunities....

Institutional IR Banner collaboration

Other SC institutions implementing Banner have been there/done that and are just a phone call or email away....



COLLEGE of
CHARLESTON
INSTITUTIONAL RESEARCH



Questions?/Discussion



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