PRAIRIE VIEW A&M UNIVERSITY

in association with

SUNGARD®
HIGHER EDUCATION

presents
Project Charter
for

BENCHMARKS
Charting the Future

A Banner Implementation Project

May 5, 2006
# Table of Contents

THE PRESIDENT'S COMMITMENT ........................................................................................................ 3

PURPOSE ........................................................................................................................................ 4

PROJECT OBJECTIVES .................................................................................................................. 5

SUPPORTING ASSUMPTIONS ........................................................................................................ 6

BOUNDARIES AND CONSTRAINTS ........................................................................................... 7

PROJECT TIMELINE/ A HIGH LEVEL OVERVIEW ....................................................................... 9

PROJECT PLANS ............................................................................................................................ 10

PROJECT ORGANIZATION ............................................................................................................. 11

OVERVIEW OF PROJECT COMMITTEES ..................................................................................... 12

1. EXECUTIVE OFFICERS COMMITTEE ....................................................................................... 12
2. STEERING COMMITTEE ........................................................................................................ 13
3. IMPLEMENTATION COMMITTEE .......................................................................................... 14

OVERVIEW OF PROJECT TEAMS ................................................................................................ 15

1. REGISTRATION ...................................................................................................................... 15
2. RECRUITMENT AND GRADUATE/UNDERGRADUATE ADMISSIONS ..................................... 16
3. ACCOUNTS RECEIVABLE ................................................................................................... 16
4. FINANCIAL AID ................................................................................................................. 17
5. ALUMNI ............................................................................................................................ 17
6. DATA STANDARDS AND REPORTING .................................................................................. 18
7. SHES TECHNICAL ............................................................................................................. 18

PROJECT DUTIES/RESPONSIBILITIES ......................................................................................... 19

1. PVAMU PROJECT MANAGER .......................................................................................... 19
2. SHES PROJECT MANAGER .......................................................................................... 19
3. MODULE TEAM LEADERS AND TEAM MEMBERS ............................................................. 20
4. SHES CONSULTANTS ...................................................................................................... 21

PROJECT ADMINISTRATION ....................................................................................................... 22

1. COMMUNICATIONS MANAGEMENT ..................................................................................... 22
2. SHES FORMAL TRAINING .................................................................................................. 22
3. SHES CONSULTING ......................................................................................................... 22
4. PVAMU END USER TRAINING ......................................................................................... 23
5. AGENDAS/MINUTES ........................................................................................................ 23
6. STATUS REPORTS ........................................................................................................... 23
7. ISSUES TRACKING ............................................................................................................ 23
8. PROJECT PLANS ................................................................................................................ 24

GLOSSARY ..................................................................................................................................... 25
The President’s Commitment

MEMORANDUM

TO: PVAMU Community
FROM: George C. Wright
       President
SUBJECT: BENCHMARKS Charter

March 28, 2006

Consistent with our goal to provide students with the best in quality education, it is appropriate that we review the systems that support efforts to that end. This occurs at a time when other institutions in the Texas A&M University System are also involved reviewing their support systems. I am pleased to announce that, over the next 2 years, PVAMU will implement Banner, the latest in Enterprise Resource Planning (ERP) systems. Selected modules for this upgrade are Student, Financial Aid, and Alumni. As you can see, these are modules that are directly related to our core mission.

The name for this effort is BENCHMARKS. We wanted a name that reflected our desire to chart a course for even higher levels of service to those we serve. This effort will provide us the opportunity to develop new benchmarks in service by creating best practices that meet our specific needs. The modules selected for this project directly affect all of our campus family from students, to alumni, to faculty and staff. Conversions are always challenging, but I am confident we are up to the challenge. We are prepared to make the changes necessary to maintain our designation as an institution of the first class.

The funds have been identified and we have committed the appropriate resources to ensure success. Now we need your help and support as we move forward with BENCHMARKS.

Let us do what we must as a University with a focus on the future. I am grateful for your support and thank you for making this University the great institution it is.
PURPOSE

BENCHMARKS
The purpose of the BENCHMARKS project at Prairie View A&M University (PVAMU) is to implement an integrated information management system capable of meeting the growing demands of our University. The selected software is SunGard Higher Education’s (SHES) Banner Enterprise Resource Planning (ERP) solution. It supports our vision of providing an exceptional quality education experience for our students.

CHARTER
To that end, this charter is the instrument that will be used to guide us through the implementation process for our improved ERP solution. The BENCHMARKS Project Charter is a rulebook that establishes the guidelines that govern the implementation process. It is also a roadmap providing the directions for achieving success. All project participants will use the charter as their guide to clarify and understand their project responsibilities. The charter empowers project teams to act on project initiatives.

This charter presents the purpose, objectives, major assumptions/constraints, and timelines, associated with BENCHMARKS. The charter is to be used as the basis for assigning responsibilities, managing change and developing plans and reports. It provides the vehicle for resolving issues as PVAMU continues on its journey toward achieving best practices for the institution. The BENCHMARKS project will enhance PVAMU’s ability to better serve its students, alumni, faculty, staff, administrators, and the community-at-large.
PROJECT OBJECTIVES

Every project has a beginning and an end. The BENCHMARKS project is no different. What is different, however, is what it will do for PVAMU. The BENCHMARKS project will aid the University in achieving its vision of the highest standards of excellence. The immediate objectives for this project are:

1. **Implementing Best Practices** - Administrative processes will be reviewed to ensure *best practices* are implemented at PVAMU. A crucial part of the implementation is the ‘Business Process Analysis’ (BPA). The BPA provides the University the opportunity to examine ‘why we do the things we do,’ improve our processes, and when, possible, automate these processes to ensure customer service, accuracy and efficiency.

2. **Instilling Empowerment Attitudes** – Users will be empowered to be more directly involved with University information. This will require added responsibilities by user departments including input accuracy, maintenance, and processing of University information.

3. **Providing Enhanced System Functionality** – In order to meet the ever changing needs of its customers, PVAMU must stay focused on providing services at increasing performance levels. The new Banner system will provide increased real time access to information (approaching 24 hours a day), 7 days a week (24 x 7) via web access.

4. **Creating Uniform Information Systems Management** – Banner will be the official information management system for student, financial aid, and alumni. It will be the single source of University information for these areas.

5. **Defining Common Data Standards** – Consistency and clearly defined terms for all system components and information will ensure uniformity of data throughout the University. A data standards policy manual will be adopted for the University.

6. **Establishing Institutional Reporting Accuracy** – Banner will provide enhanced reporting capabilities through Banner canned reports, ERIS and an ad-hoc reporting tool (to be selected later) to ensure accurate data necessary for internal and external reporting to students, faculty, staff, administrators, and governmental agencies.

7. **Training** – Training documentation will be developed by the team leads in conjunction with SunGard consultants. Additionally, 35 on-line learning modules, based on user documentation/BPAs, will be developed to assist Banner end users in learning the features of Banner.

8. **Implementation of Banner** – Admissions and Recruitment will be utilizing Banner in fall 2007 admitting students for the fall 2008 semester. The first registration activity in Banner will occur in the April 2008 for the fall 2008 semester. Financial Aid plans to distribute in February/March 2008. The Alumni system will also go live in a similar timeframe but the exact date has not been determined at this time. All three systems will be live by the end of May 2008.

9. **Workflow** – Processes will be identified that could be managed in a mechanized, workflow environment, allowing for a reduction in paperwork, processing, and more timely transaction tracking.
Supporting Assumptions

The following assumptions are presented to help prepare the way for exciting and dramatic changes in PVAMU’s future.

1. **Change** – Change is inevitable. It compels us to consider ways to improve. Banner is a catalyst that challenges us to rethink our processes to improve our performance. As in any large scale implementation, the University’s culture will be challenged to change as best practices are developed for more efficient processes.

2. **Enterprise-Wide System** – Banner, and its information, is owned by the University. Information is shared with user departments to reduce redundancy and improve accuracy and efficiency throughout the University. Teamwork is paramount. This is not a time for tunnel vision! As in any great system, all components must work as a whole, meeting the needs of all concerned.

3. **Business Processes** – The current business processes among user departments will be reviewed. Once completed, a best practices map will be developed to guide the University through the conversion process and into real-time use of the new system. Processes will be established that will ensure continuous improvement so PVAMU will be able to update its practices when needed.

4. **Accountability** – Users will be accountable for information they input. Controls will be established in Banner to facilitate accuracy and accountability.

5. **Commitment** – The University has committed available resources to meet the challenges involved with the BENCHMARKS project. Managers must work to ensure the proper use of both release time and when necessary, backfill resources. To do this, resource needs must be addressed as soon as they are identified. The Project Management Team (PMT) must be advised of any conflicts affecting the BENCHMARKS project.
   
   - **Release time** – Committee members and work teams must be afforded the release time necessary to meet the demands of the project. It will be incumbent on each team member and their respective Department Head to resolve resource conflicts. In order to meet the project time and budget constraints, Banner **MUST** be a priority. Each participant is encouraged to evaluate critical and non-critical functions. Open dialogue with management, supervisors, and employees should resolve most conflicts by transferring or eliminating non-critical functions.
   
   - **Backfill** – Complete coverage is not an option and only limited assistance can be expected. In the most serious resource situations, backfill support may be available. In order to best utilize available resources, backfill positions must be considered carefully and discussed in detail with the PMT prior to making commitments.
Recognizing that there are boundaries and constraints in any major project such as BENCHMARKS, it is appropriate that they be identified here as well.

1. **No System Modifications** – Baseline Banner provides a very broad window for product configuration. The BENCHMARKS team will work within the standard configuration limits of Banner. Local modifications to Banner’s core program are not to be made. Modifications hamper the ability to install subsequent releases to Banner. Texas Connection modifications are, however, acceptable and will be implemented as needed.

2. **PLUS/Legacy System Modifications** – Due to the resource requirements to implement Banner, requests for modifications to the PLUS system will be limited to only those modifications that involve mandatory state or federal regulatory changes. Each request must be thoroughly discussed with the involved departments, IT, and the PMT. Only those requests approved by the PMT will be implemented.

3. **Cost Containment** – Cost is a major constraint. There are only limited dollars for implementing BENCHMARKS. The project has an approved budget, and it must not be exceeded. That is why project activities must be viewed as a priority.

4. **Timeframes** – Timeframes have been established and are intricately tied to budgets and resources. The project began in February ’06 and will conclude by the end of May ’08. By this time, the University will have achieved a good knowledge transfer, and Banner will have been implemented. Anything that jeopardizes the timeframes and or budget must be brought before the PMT, Steering Committee, and/or Executive Officers as appropriate.

5. **Resource Limitations** – It is recognized that the University has a resource limitation implementing a new system with virtually the same staff that must continue to run the University. In order to have an effective implementation with this constraint, each department must re-evaluate the activities required to meet the most critical functions. Many activities once considered necessary may be foregone so that the project may progress properly for the overall benefit of the University. It is suggested that all employees assess their “must do, should do, and would like to do” activities. This will help identify how resources may be utilized most appropriately. It is not intended that any one employee be called upon to sacrifice beyond their limitations.

6. **Workloads** – Workload constraints must be considered. The BENCHMARKS project is a priority and conflicts must be discussed and resolved in a timely manner. The project team must exercise leadership in the creative resolution of workload demands. All concerns should be discussed with the PMT immediately to help determine if backfill resources are available in any given situation.
7. **University’s Operational Calendar** - The BENCHMARKS project timelines were established in consideration of University’s normal observance of holidays, vacation, and etc. This was done to provide the optimal time to activate each module.

8. **Interface Requirements (Auxiliary vs. Shadow Systems)** – Auxiliary systems are those systems that provide services not included in Banner. As such, these systems must be interfaced with Banner for the most effective use of all systems. FAMIS is an example of an auxiliary system, and it must be interfaced with Banner for certain critical information. Shadow systems, however, are those systems, that contain information that is already in Banner. It is not intended that these systems will be interfaced with Banner because shadow systems are a major source of inaccurate data leading to inaccurate reporting. The Benchmarks project affords an excellent opportunity to eliminate shadow systems. A review of shadow systems will be conducted. These reviews will include input from user departments, IT, and the PMT.
## Project Timeline/ A High Level Overview

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<th>Year One 2006</th>
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### Year One 2006
- **Collegis Project Management** (18) On-Going Support
- Scrub Data
- Begin Training
- Banner Student - Gen. Person/Gen. Student (4)
- Banner Student Admissions (6)
- Scrub Data
- Begin Training
- Banner Student - Registration (11)
- Scrub Data
- Begin Training
- Banner Student - A/R (9)
- Begin Formal Banner Training Awards
- BPA
- Banner Financial Aid Implementation (12)
- Begin Formal Banner Training
- BPA
- Banner Alumni Implementation (13)

### Data Standards & Reporting
- Begin Data Standards Effort
- Data Standards & Reporting
- Banner Implementation Backfill

### Technical & Administrative Management
- Hardware Order/Install Serif
- Prepare/Scrub data for conversion

### Notes
- This "timeline" is a general projection. For more details on dates/tasks, please refer to the detailed MS Project plans. All dates are subject to change based on the environment at any time. The most significant date is the end of May 2008. The project should be basically implemented by that date.
Project Plans

Milestones
The project milestones are those major events around which the detailed project plans were developed. Milestones provide a high level view of the project and help gauge the progress toward project objectives. The PMT will continuously monitor milestones and ensure they receive the focus needed in project meetings.

Detailed Plans
Each Banner module has detailed project plans that are maintained by the assigned SHES consultant for each module. These project plans will be kept updated to meet the requirements of a timely and effective implementation. The project plans are tailored specifically to PVAMU. They are “living” documents and will reflect the latest information as best practices for PVAMU are determined. These working plans will be stored on the BENCHMARKS folder for use by team members. Initially, the project files will be stored on the PVAMU folder: \pvfiler-01\banner_install\. Instructions will be sent out to provide access for team members. There will also be an “open” folder for the university community to keep abreast of current tasks and progress toward completion.
**Project Organization**

The project structure employed here includes the team hierarchy, reporting lines, and work group areas of responsibility. It is expected that issues will be addressed from the bottom to the top. To accomplish this, team leaders will represent their groups to the next higher level. Once reporting reaches the committee level, the Project Management Team will represent the Implementation Committee to the Steering Committee and Executive Officers. This process allows users that are most familiar with the subject matter to report on their areas of expertise.
Overview of Project Committees

1. Executive Officers Committee

Oversight for the BENCHMARKS project will be provided by the PVAMU Executive Officers through their regularly scheduled meetings (EOM). They have the ultimate responsibility for ensuring that the project is completed successfully. They will provide strategic direction to the Project Management Team (PMT). The PMT is comprised of the PVAMU and SHES project managers. The EOM’s authority serves as the final word in resolving policy issues and addressing the most serious risks associated with the project. The EOM will be provided status reports regarding the progress made on project milestones. The PMT will identify areas of concern and recommend courses of action as appropriate. Ad hoc meetings may be called but only in unusual circumstances requiring immediate attention. The PMT will submit prepared outlines/agendas and subsequent minutes for project concerns brought before the EOM. When appropriate, working documents may be posted to the web as part of the communications effort. Initially, members of this committee include:

- President
- Provost and Senior Vice President for Academic & Student Affairs
- Vice President for Business Affairs
- Vice President for Administration and Auxiliary Services
- Vice President for Institutional Relations and Public Service
- Vice President for Research and Development
2. **Steering Committee**

This committee, appointed by the President, is chaired by the Vice President for Business Affairs and includes senior management in respective areas of the University. They will provide tactical guidance and direction for the BENCHMARKS project. This committee will convene twice a month. Timing should be such that it will always occur just prior to EOM meetings. This is to ensure timely communication channels throughout the organization. The committee is responsible for resolving policy and procedural issues not requiring EOM approval. When necessary, this committee will escalate policy issues, with recommendations, to the EOM. Members of this committee are responsible for ensuring the project structure operates effectively and that respective organizations are meeting their responsibilities and time commitments to successfully implement BENCHMARKS. The committee will work with the PMT toward overall project communication to all campus constituents. When appropriate, working documents may be posted to the web as part of the communications effort. Initially, members of this committee include:

- VP for Business Affairs - Chair
- Provost and Senior VP for Academic and Student Affairs
- Associate Provost for Academic & Student Affairs
- Associate Provost for Enrollment Management
- Associate Vice President for Student Affairs
- Associate Vice President for Development
- Controller
- Dean of the Graduate School
- Director of Human Resources
- PVAMU Project Manager
- SHES Project Manager
- Student Body President
- Faculty Senate President
- Staff Advisory Council Chair
3. **Implementation Committee**

This committee, also appointed by the President, is chaired by the PVAMU PM. Members of this committee include the SHES PM as well as team leaders from all project modules. This committee is the hands-on managing body for the BENCHMARKS project. The committee is responsible for recommending and establishing functional and technical practices and procedures. It will evaluate issues and associated risks. Many issues are resolved at the Implementation Committee without ever having to be referred to the Steering Committee or the EOM. When issues that are referred to the Steering Committee or the EOM, the PMT will provide options that may be considered. It is expected that committee members will devote a significant amount of time to the BENCHMARKS implementation project. The committee will meet weekly. The PMT will prepare agendas and minutes for the committee from topics provided by the project team leaders. These working documents may then be posted to the project web site for project members to review. Initially, members of this committee include:

- PVAMU Project Manager - Chair
- Enterprise Applications Director
- Registrar
- Assistant Director of Institutional Research
- Director of Undergraduate Admissions
- Administrative Assistant, Graduate School
- IT/Database Administrator

- SHES Project Manager - Vice Chair
- Director of Financial Aid
- Gifts and Grants Coordinator
- Director of Recruitment and Marketing
- Manager of Treasury Services
- Interim Assistant Controller
Overview of Project Teams

Module teams (Student, Financial Aid, Alumni, Technical, Data Standards, etc.) and the associated support teams are required to devote a significant amount of time to the BENCHMARKS project. A module team is comprised of a team leader(s) and selected power users from the Banner module assigned. For example, the Alumni module team is composed of a leader from the Alumni office and team members should be power users from that office. Module teams and associated work groups meet frequently with the SHES consultants. The SHES consultants work to see that the module teams understand the formal Banner training and how it affects best practices at PVAMU. It is the responsibility of the module team leader(s) to ensure that their module is implemented within the time frames identified. The SHES consultants provide assistance to complete a knowledge transfer to the PVAMU teams.

The SHES module consultants for Student, Financial Aid, and Alumni Development will utilize MS Project to develop and maintain project plans for their respective modules. The module project plans will be maintained and forwarded to the PMT for posting to the project web site.

Additionally, the SHES consultants and their respective module team leaders will provide the PMT with the working documents to include weekly status reports, Issues and Risks Tracking reports, and team meetings agendas and minutes. The formats and procedures for these working documents will be provided to the team leaders.

Following are the module teams and the respective members (by function) for each module team:

1. **Registration** – The Registration team is composed of two co-team leaders, leaders from the registration work groups, a SHES technical resource, and a SHES consultant for the Student module.

   - Registrar Co-Team Leader
   - Registrar Co-Team Leader
   - Scheduling (Facilities Planning)
   - Faculty Data (Institutional Research)
   - Academic History
   - CAPP (Degree Audit)
   - Student Event Location
   - Academic Advising
   - Continuing Education
   - Texas Success Initiative
   - SHES Student Consultant
   - SHES Programmer

While implementing this module, the team representatives will meet at least weekly, as a group, to discuss and document the project’s progress. Specific duties include:

- Identifying issues
- Proposing solutions
- Determining and assigning action items
- Preparing working documents to support team activities
- Meeting frequently once work has begun on this module
2. **Recruitment and Graduate/Undergraduate Admissions** – The Recruitment/Admissions team is composed of three co-team leaders, leaders from the associated work groups, a SHES technical resource, and a SHES consultant for the Student module.

- Recruitment Co-Team Leader - SEVIS (Human Resources)
- Graduate Admissions Co-Team Leader - SHES Programmer
- Undergraduate Admissions Co-Team Leader - SHES Student Consultant

While implementing this module, the team representatives will meet at least weekly, as a group, to discuss and document the project’s progress. Specific duties include:

- Identifying issues
- Proposing solutions
- Determining and assigning action items
- Preparing working documents to support team activities
- Meeting frequently once work has begun on this module

3. **Accounts Receivable** – The Accounts Receivable (AR) team is composed of two co-team leaders, leaders from the associated AR work groups, a SHES technical resource, and a SHES consultant for the Student module.

- AR Co-Team Leader - Library
- AR Co-Team Leader - SHES Programmer
- Auxiliary Services - SHES Student Consultant
- Housing

While implementing this module, the team representatives will meet at least weekly, as a group, to discuss and document the project’s progress. Specific duties include:

- Identifying issues
- Proposing solutions
- Determining and assigning action items
- Preparing working documents to support team activities
- Meeting frequently once work has begun on this module
4. **Financial Aid** – The Financial Aid Team is composed of two co-team leaders, leaders from the associated Financial Aid work groups, a SHES technical resource, and a SHES consultant for the Financial Aid module.

- Financial Aid Co-Team Leader
- Financial Aid Co-Team Leader
- Funds Management
- Awards
- Disbursements
- Packaging
- SHES Programmer
- SHES Fin. Aid Consultant

While implementing this module, the team representatives will meet at least weekly, as a group, to discuss and document the project’s progress. Specific duties include:

- Identifying issues
- Proposing solutions
- Determining and assigning action items
- Preparing working documents to support team activities
- Meeting frequently once work has begun on this module

5. **Alumni** - The Alumni Team is composed of a Alumni Module Leader, leaders from the associated Alumni work groups, an SHES technical resource, and an SHES consultant for the Alumni Development module.

- Alumni Team Leader
- Development
- Gifts & Grants
- Alumni Relations
- SHES Alumni Consultant
- SHES Programmer

While implementing this module, the team representatives will meet at least weekly, as a group, to discuss and document the project’s progress. Specific duties include:

- Identifying issues
- Proposing solutions
- Determining and assigning action items
- Preparing working documents to support team activities
- Meeting frequently once work has begun on this module
6. **Data Standards and Reporting** – The Data Standards Team is comprised of a cross section of team leads from the Implementation Committee and other select users. Headed by the Associate Director of Institutional Research, this group will meet weekly to discuss the progress on the Data Standards and Reporting.

- Institutional Research Team Lead
- Finance
- Human Resources
- Financial Aid
- Alumni
- Registrar
- Graduate School
- Distance Learning Council

- Auxiliary Services
- Undergraduate Admissions
- Student Affairs
- University College
- SHES IT
- PVAMU Project Manager
- SHES Project Manager

While implementing this module, the team representatives will meet at least weekly, as a group, to discuss and document the project’s progress. Specific duties include:

- Identifying data standard guidelines
- Establishing measures for the protection and access of data
- Establishing guidelines for the reporting of data
- Recommending policy and process changes
- Defining basic roles and rules for system governance
- Educating departments on guidelines when necessary
- Determining and assigning action items
- Preparing working documents to support team activities
- Meeting frequently once work has begun on this module

7. **SHES Technical** – The Technical Team is composed of the SHES Technical Director, members from the associated technical work groups, and when necessary, a SHES technical consultant. They are responsible for all IT issues related to security, data cleansing, data conversion programming, data conversion from SIS Plus into Banner, system interfaces to auxiliary systems, and other technical items.

- SHES Technical Team Lead
- SHES Programmers
- Security

- SHES Technical Support
- SHES DBA
- WebCT

While implementing this module, the team representatives will meet at least weekly, as a group, to discuss and document the project’s progress. Specific duties include:

- Identifying issues
- Proposing solutions
- Determining and assigning action items
- Preparing working documents to support team activities
- Meeting frequently once work has begun on this module
Project Duties/Responsibilities

1. **PVAMU Project Manager**
   The PVAMU Project Manager (PM) will work with the Vice President for Business Affairs and the SHES Chief Information Officer (CIO) to ensure that all project activities are coordinated for a successful timely completion. The PVAMU PM is responsible for reviewing and troubleshooting all functional activities for the project. Having overall responsibility for the project’s success, the PM is responsible for:
   - The project Statement of Work (SOW)
   - The project charter
   - The project plan/schedule/budget monitoring
   - Project working documents
   - The management of project participants to fulfill their respective roles and responsibilities
   - The successful completion of the project

2. **SHES Project Manager**
   The SHES Project Manager (PM) shares responsibilities with the PVAMU PM and serves as an advisor to the PVAMU PM on all aspects of the implementation. This includes assisting the PVAMU PM in developing the various procedures and documentation (such as the project charter, project plans, training, etc.) necessary to manage the project.

   The SHES PM will coordinate all BENCHMARKS SHES activities such as trainers, consultants, and IT matters. The PM provides guidance for the overall implementation to meet the established timeframes and budget so the SHES resources are available to deliver best practices that meet the unique needs of PVAMU.

   Together, the PVAMU and the SHES PMs comprise the Project Management Team (PMT). They serve as managers of the entire project; providing on-going communication, support, reviews, and feedback throughout the implementation. They will manage project activities to see that issues are dealt with in a timely manner. The PMT will also serve as advisors to the EOM and the Steering Committee. Together they will serve as chair and vice chair of the Implementation Committee.

   The PMT is charged with the successful completion of the BENCHMARKS project. They are responsible to see that the obligations of both the University and SHES are met.
3. **Module Team Leaders and Team Members**

The PVAMU module leader serves as the *subject matter expert* (SME) in their respective modules. They see that Banner is implemented effectively and efficiently for *best practices* as identified by the SHES consultants. Module team leaders are responsible for cross-functional integration between work groups and technical teams. They serve as catalysts to see that their areas of responsibility are addressed. The module team leader is to resolve and/or escalated, issues and proposed solutions, to the PMT. They will participate in all aspects of their module’s implementation from BPA’s, conversions, “go live” and “clean-up.” It is their responsibility to keep the PMT informed. They will work with SHES consultants to provide working project documentation agendas, minutes, weekly status reports, and issues to the PMT in a timely manner.

Each work group will have a leader/spokesperson to represent their views and progress to the associated Module Team Leader(s). Specific work groups are listed in the sections above, with the overview of each module.

Module team members will become Banner *power users*. They should be familiar with how functions are presently performed in their departments now and how they should be completed in Banner. These power users are the cornerstones for the BENCHMARKS project. They are the individuals who will train the University’s end users on Banner. This is where the real work is done. Module team members will meet frequently when work has begun in their respective Banner module.

Members of the work groups will receive formal Banner training from SHES trainers. Additional *hands-on* training and consulting will be provided by the SHES consultants. Work group responsibilities include but are not limited to:

- Planning the seamless move to Banner
- Fostering partnerships and collaboration with other team modules
- Reviewing current practices, processes and procedures
- Recommending changes as needed
- Developing, reviewing, and implementing conversion activities
- Assisting in the definition and design of data elements to be retained
- Establishing long-term data retention procedures
- Developing functional specifications/testing with the technical team
- Creating and validating user procedures
- Developing contingency plans to restore existing data if necessary
- Assisting in defining workflows, input/output forms, and reports
- Providing research support for issues and problem resolutions
- Scrubbing and converting data with the technical team
- Identifying and resolving issues at the lowest level possible
- Preparing and tracking Issues and Risk Tracking Reports
- Preparing agendas and minutes for meetings
- Escalating issues to the module team leader(s)
4. **SHES Consultants**

The SHES Consultants serves as the on site guides for the Banner implementation. They report to the SHES PM to advise, consult, and otherwise facilitate the Banner knowledge transfer to PVAMU. They will work toward the successful implementation of Banner and advise project teams on *best practices* for the PVAMU environment. They also keep the PMT apprised of critical path activities, identify risks, and recommend solutions to issues.

The SHES consultants will conduct BPA’s to ensure current processes are understood. From these they are able to facilitate the use of *best practices* for PVAMU. They will work with the team leaders to produce detailed project plans, issue tracking reports, agendas, minutes, and status reports. They advise and guide their respective module team leaders in completing their responsibilities in an accurate and timely manner.

The SHES consultants also:

- Organize user requirements
- Provide expertise
- Facilitate the creation of test scripts and testing methodology of software patches and system enhancements
- Provide system analysis
- Problem solving support
- Programming support as necessary
Project Administration

1. **Communications Management**
   The primary public communications tool for the BENCHMARKS implementation is the PVAMU website. Once the project website is created, the web address will be published. The project working documents will be stored in the “\pvfiler01\banner_install” shared folder. It will provide all of the information necessary to coordinate the project. The shared folder is the place to go for working documents related to the project. The PMT will ensure easy access to information through these basic services. This process will be developed further as the resources are identified and built.

2. **SHES Formal Training**
   SHES will provide the formal classroom training on the usage of Banner. This will be accomplished through a series of training sessions by each module. These training sessions should include the module team leader, team members, and selected power users in the departments. SHES trainers/consultants will also conduct training sessions as needed for the IT staff. With the assistance of the PMT, team leaders and SHES consultants will coordinate date and space requirements for their teams.

3. **SHES Consulting**
   Following SHES formal classroom training, the SHES consulting staff will provide “hands-on” assistance and training to the implementation teams. Their primary goal is to identify and present best practices for PVAMU. This will assist that the power users in understanding how Banner is structured so it can be implemented to the university’s best advantage.

   It is important that module team leaders maintain working documentation throughout the implementation process. Project documentation goes well beyond the BPA’s and the related gap analyses. Documentation should include the decisions made by project team and why. This will provide the basis for the consistent application of Banner rules and tables. These will, in turn, provide the basis for developing end user training. SHES consultants will assist in organizing this effort.

   SHES consultants will provide thirty-five online learning modules from user documentation that will assist PVAMU in end user training. These learning modules will focus on significant processes within the Banner Student, Financial Aid, and Alumni Modules. SHES consultants will work with module team leaders to verify accuracy regarding all policies and procedures. Documentation should include references to specific PVAMU policies and procedures where appropriate. Learning modules will be created as components of a WebCT course, be no more than one hour in length each, and will be fully ADA compliant though the use of PDF, HTML, and Camtasia (Flash) applications. Anticipated modules to be developed include Advisement/Registration, Course Scheduling, Degree Audit Review, and Grading.
4. **PVAMU End User Training**

PVAMU will utilize a “train the trainer” model to train the end users. In effect, module teams/ *power users* will be trained by SHES trainers and consultants. These *power users* will then train the end users in their respective departments. In most cases, end user training will be hands-on in a classroom setting. It is anticipated that the PVAMU end-user trainers will utilize the thirty-five online learning modules as developed by SHES as adjuncts to the end user training for each module. Team leaders should note that these thirty-five online courses will not function as the only training documentation, but they will serve to supplement more in-depth end user training. A more definitive procedure will be developed as the project teams become more familiar with Banner. (See the above section for SHES Consulting).

5. **Agendas/Minutes**

The working agendas/minutes of meetings will be stored on the project website under each committee or team’s section. The PMT will prepare minutes and agendas for the three committees with which they are associated. The module team leaders, with the assistance of the SHES consultants, are responsible for the generation of agendas and minutes for their respective teams. Copies should be sent to team members and the PMT. The PMT will then post these to the BENCHMARKS website.

6. **Status Reports**

Status reports keep project members up to date with activities in their own teams. Team leaders will submit a weekly status report to the PMT for posting to the web. The SHES consultants will assist the team leaders in generating reports. Once implementation has begun on that module, status reports are due to the PMT by noon each Friday.

The PMT will combine and condense the various team status reports. An executive summary will be submitted to the committees and posted to the web. This report will address project status, identify issues, and recommend solutions.

7. **Issues Tracking**

Identifying issues early will facilitate the orderly implementation of the project. An “issue” is defined as a concern that has been identified and needs resolution. An issue may be identified at any level of the organization. Once identified, the issue must be evaluated by the team leader to determine what modules are affected. If only one module is affected, it will be assigned to that module team leader for review and resolution. If more than one module is involved, the PMT will determine which team should lead in resolving the issue. Issues should always have proposed resolutions and associated risks. Examples of possible issues include: cross functional needs; audit compliance; and policy revisions.

Each committee and work group will maintain an issues list of items related to the implementation of their respective processes/functions. Once an issue has been escalated to the Implementation Committee, the PMT will assume responsibility for tracking and resolving that issue.

Most issues will be resolved at the Implementation Committee level. Policy matters are usually resolved at the Steering Committee and EOM level.
8. Project Plans
The SHES consultants for Student, Financial Aid and Alumni Development modules will utilize MS Project to maintain project plans for their respective modules. Project plans should be provided to the PMT for updating the web version of the project plan.
Glossary

**Auxiliary System** – Computer systems not directly connected to the central administration system (Banner). These are systems that facilitate authorized university business functions and interface with Banner. Examples include: FAMIS, WebCT, or Auxiliary Services Diebold Card System.

**Banner** – The technology solution chosen by PVAMU to provide an integrated (ERP) data management system for Student, Financial Aid, and Alumni Development for the entire campus.

**BPA** – Business Process Analysis

**Collegis** – Formerly Collegis, the SunGard Higher Education Solutions (SHES) consulting team serves as partner to assist PVAMU in implementing Banner.

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

**DBA** – Database Administration is a technical responsibility of the IT department.

**End User** – A person who is a user of the Banner System.

**ERP** – Enterprise Resource Planning application solution

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

**IPEDS** – Integrated Post Secondary Education Data System

**Integrate** – Coordinated data from disparate sources. Example: Student names entered in the Banner Student module integrate with the Human Resource/Payroll system. If a student becomes an employee their name already exists in the system and need not be entered again.

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

**Legacy System** – The system being replaced is referred to as the legacy system.

**PMT** – Project Management Team/Core Team Members

**Power User** – Person who is very knowledgeable (expert) on usage of the Banner module in their department. This person will be the “go to” person in the department to assist other department staff on usage of Banner.

**SCT** – Formerly SCT, SHES formal training is provided by this group.
**Shadow Systems** – Data bases or processes that have been developed within departments to meet a specific need unmet by the SCT Plus system.

**SHES** – SunGard Higher Education Solutions includes all aspects of IT solutions from implementation, conversion, and management of the ERP solution.

**SMEs** – Subject Matter Experts

**TNG** - Training