

# Banner Student Meeting Agenda

June 4, 2015 8:00-9:00am

## I. General Items

1. June 5<sup>th</sup>, Financial Aid patch 8.23 and 8.23.1 shutdown from 5:30 pm – 8:00pm
  - a. Apply patch to the patch
  - b. New updates released 5/29/2015 for Pell Grant and student loan disbursement.
2. L7 data center remodeling: On June 26th (new date) we will switch electricity to a generator.- information only, everyone acknowledged.

## II. Priority Issues

1. New federal law AB13: From July 1st, all non-resident tuition fees for veterans need to be waived; if we don't, they will lose their GI bill. ETS will work with Nazy and Joan to come up with specifications. Upper management needs to approve this action and put together a new policy. For now, ETS needs to run a report for all veterans who are non-residents. Colleges have handled this issue at this time. Possible to create a new residency code. Will wait until Nazy returns.
2. Changes to the student success check list on MyPortal. It was suggested by De Anza management to update the student success check list (add "select or verify your ed goal", change wording of "complete orientation to college class" to "complete orientation"). It is currently a dynamic list for students that started from fall 2014. Priority Registration is mainly for new students; student success check list is for all students. Testing and fixes complete; ready to be moved to PROD.
3. Students with first name ".": Sherri added that a series of name changes from SEVP will be coming in June, resulting in the need to manage three names; this will be handled in Sunapsis. Further discussion is needed to decide what should go into Banner. Ellucian is in discussion with SEVP. Sherri will keep us updated. – Currently there is discussion among HR, Financial Aid and A & R regarding this issue. Banner doesn't allow the field to be blank. May be problematic for software. First name is used for common matching. Bill is adding "." for suspended records; ETS needs to review their procedures internally, possibly to check if it is an international student.
4. System problems:
  - a. Financial Aid Refund: Jerrick will work with Rachel and Jorge before he leaves on vacation to make changes to the Popsel because of the cross year.
  - b. Stephen reported that ineligible drop process is dropping people that shouldn't be dropped. (Some who have passed the prerequisites). It is not picking up in SFASRPO. Jerrick is looking into it. Nazy may have some input on this from a process point of view at the user's end. – Monitoring
5. Argos new release: Self-service, web-enabled. On site engagement needs to be scheduled, possibly mid August.
6. Enhancements to student registration
  - a. ETS will look into displaying a pop up message when they are added to the waitlist to warn them that if they exceed 21 1/2 units, they will not be automatically enrolled. Report on APEX is in place. – ETS is working on the pop up message
  - b. Students should be allowed to register for hybrid classes up until 11:59 p.m. the day prior to the on-campus meeting. Currently it is treated as an on-line class and registration stops

at 11:59 p.m. on Sunday before the quarter starts. The waitlist should continue to roll until the on-class meeting. ETS is testing the process and hope to implement it by Friday, 6/5/15.

7. Non-resident, out-of-state students will have their fees waived for the first 6 units every quarter from spring quarter. **Testing with users in progress, some code adjustments needed – in progress.**
8. Student Dashboard:
  - a. ETS will look into the situation where a previously employed employee has a new contract, their old privileges are automatically attached to the new contract instead of default values. Matt is working on it. Bill will confirm with Nazy and Joan that they will review verify the correct privileges before they save them (38 check boxes). Bill said that if the employee has no privileges, the check boxes are no longer accessible. It can't be provisioned by role because temporary employees aren't assigned a role.
  - b. Some summer classes are not showing up in dashboard for unofficial transcripts. (Nazy provided CRN#). Chris will look into this.
9. Moaty still needs the report from DGW of students who are close to or has completed a certificate; very important for 3SP. Kent McGee of De Anza is working with Jerrick on this, it should provide report to Moaty this week.- ETS is working with Kent, should be delivered from within DWG report. Jerrick will verify.
10. First week payment reminder and second week payment reminder needs to be automated. Rachel/Jorge have finished watching the training videos for Argos. Folder-level database designer access granted to both. Working with Rachel/Jorge.
11. Automate sending e-mails for financial aids for charge backs when the students reduce their load. Lisa will check with Kevin on status. – Priority before July 6th disbursement.
12. Automate information for student employees to feed into Banner automatically. (They don't go through the HR intake process).

### III. Standing Agenda Items

1. DegreeWorks:
  - a. Making a new plan active changes the signatures on all the previous plans. It is currently displaying the modified name instead of created name. We need users to certify so that we can move to prod asap.
  - b. Would like to use the template so that once you reassign one quarter, it automatically reassigns all the other quarters. Kent is building the templates.
  - c. On-site visit for Melissa: 3rd or 4th week of October. Chien will reserve Melissa's time.
2. Mobile app (Not discussed, waiting for patch release from Calb, Ellucian)
  - a. Ellucian Go is in conflict with Cal B. Ellucian said they will fix it in 60 days.
  - b. Will need to enter pictures of buildings, longitude and latitude. Rooms are also not in Banner.
  - c. PR for the Payment Gateway has been signed off.
  - d. Santa Barbara has rolled out mobile successfully without registration or payment, and little training.

- e. Initiative to provide electronic storefront for cash and credit card payments to pay on-line using Touchnet u-commerce. Module also available for international payments. Will involve custom code for security, integration with Banner.
  - f. Target: Roll out in summer for fall term.
  - g. Need to plan how students will use it. Individual departments can send notifications to individuals or groups.
3. Open CCCApply
- a. Migration completed, both colleges are testing, ETS stands by to support issues reported.
  - b. Interested in the noncredit module and BOG fee waiver module from the State Chancellor's office. Ellucian has a module called "Elevate" that will handle the noncredit module. BOG fee waiver (high priority) next step:
    - 1. Met with State Chancellor Technology Office
    - 2. Interface with Banner and rules setup will be done by 6/30/2015
    - 3. QA testing will be done by 7/10/2015
    - 4. BOG WAVER will go live 7/17/2015 before fall registration starts.
4. BDM: in progress
- a. FH A&R: FNTI quote for Foothill: \$99K. De Anza's quote: \$40K. Definitely needs to be done. Nazy will talk to Kevin. Rachel handed over student receivable info on CDs to Joe Lampo, which needs to be kept for 7 years. Nazy reported, no money found yet, is working on it. Quote is good for 120 days
  - b. Special report of Payroll and HR scanning: will be done end of August, 2015. All of payroll legacy is in BDM. Next pick up for HR next week.
5. Security: ETS plans to incorporate a new password reset protocol. It will ask you which phone number you would like to be reached at and will call that number. It will give you a code that you must enter to change your password. Until this is available, the staff member must come in person to the ETS help center @ De Anza or to Bill Baldwin @ Foothill to change their password. Some faculty only come in the evening or Saturdays. Both A & R offices have offered to be backups. Deans can vouch for faculty members. – Not discussed, information to team only.
6. ISE : Foothill ISIR (Institution Student Information Report) data load is in Production for FH. ETS and Kevin worked together with DA on 5/20/15. Next step is to continue to run one box at a time in PROD. Jerrick will touch base with Gary. Next ISE project: Grade roll.
7. Moaty would like active division to show the actual date the student was added to the class. Proposed solution has been documented, approved by both colleges' academic division deans – still in development.
8. e-Bill and e-Refund: July 17, 2015 will upgrade Touchnet payment gateway service to version 6.5 (estimate a couple of hours) which may have a solution for the cashier office to reformat it to look like an invoice. ETS will install 6.5 in test via Banner Connect. ETS will communicate the test schedule to the cashier offices. We hope to raise the priority for e-Refund.
9. Baseline version to change ed goal: Now available in PROD for students. ETS is testing on giving the counselors the ability to change the ID and run the job in SSB. – needs to streamline both colleges to use SSB, Jerrick is coordinating this change, Deepa will help on procedure documentation.
10. Touchnet e-commerce marketplace: District finance expected to sign the contract within the next couple of weeks. For on-campus events, may be able to pay with cell phones and charge on credit cards.

Possible implementation target June 2015. Touchnet has expanded to become a payment gateway and a credit card payment processing company.

11. SARS: Integration of SARS schedule and Outlook calendar rolled out for Foothill; ready to roll out for DA, testing user setting instructions with DA Counseling. Will inquire if SARS Anywhere can handle single sign on. Test environment to be made available for users and then upgrade in August. Nazy said that FH and DA are reviewing Starfish. Rolled out to De Anza users as well, now this feature is LIVE for both campuses.
12. Faculty Inquiry Tool (FIT) IR Project: Work group reviewed the specifications and Deepa making some minor changes. – Specification are out for review. No change to report.
13. Working on New Service Level Agreements for:
  - a. The start of a new quarter: Next meeting held. SLA draft will be created.
  - b. Provisioning new accounts and e-mail. ETS has started working on the flow chart.
  - c. Possibly work on end of the quarter next. – End of terms SLA process reviewed with work group, drafting of document is in progress. Document review meeting will be scheduled.
14. Need to roll the class lists from Banner to Catalyst. Students choose different names and the faculty needs to guess. Jerrick clarified that the Catalyst data is from Banner. Feedback from Dave Garrido and Kevin Metcalf: Students have the ability to edit their profile in Catalyst. It allows them to modify their name to reflect what they use, e.g. Frederick goes by Fred. Once in a while they get a student who modifies their name so dramatically that the teacher has trouble identifying them, but apparently it isn't often. Both Catalyst and the Faculty Portal include the Student's Official CWID, so faculty always have a way to find the "official" name we have on file for a student.