Student Management System Project

Implementing the Banner system

Campus Updates February-March 2018
SMS Project Overview

The project involves the installation and delivery of a new student management solution that manages the full lifecycle of students and Western Sydney University, including:

• application
• enrolment
• course progression, and
• graduation

To ensure the solution addresses current SMS inefficiencies, the program includes a review of all existing processes and is identifying pain points and process improvements which were included in our tender to selected vendors.
Why a new Student Management System?

Callista acquired by Tribal in 2015 – their solution SITS: Vision was not considered to be ideal in the Asia Pacific region and a benchmarking review was undertaken.

The SMS Benchmarking Review 2015 identified alternative systems that would better meet the needs of the University and a tender process was approved.

How was the decision made?

An extensive selective tender process conducted in July 2016 – July 2017 resulted in the final approval by the Board of Trustees August 2017.
Student Management System tender in a snapshot

- 5 vendors submitted 6 proposals on 29/08/2016
- 1096 requirements x 6 proposals = 6576 responses.
- 63 evaluators who reviewed
- 1086 pages of long form responses about training, change and solution delivery
- 22 hours of vendor demonstrations with average 50 staff attending
- 4 shortlisted vendors
- 2 vendors
- Proof of concept sessions 10-28 October 2016
Approved Solution

Banner® by Ellucian

Banner® by Ellucian is the world’s leading higher education ERP—the solution of choice for almost 1,400 institutions in 40 countries. With the industry’s most comprehensive set of features and future-ready technology, Banner strengthens every major workflow in higher education, from student recruiting and retention to talent attraction and management.

http://www.ellucian.com/student-information-system/
What is the new system called?

Banner® Student Aid

Banner Student

Core Student Management System

Ellucian CRM Advise
## Benefits of the Ellucian suite of products

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<th>Preconfigured best practice processes based on over 1400 institutions</th>
<th>Improved functionality for International processes</th>
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<td>Embedded workflow</td>
<td>Proactive approach to early intervention for students at-risk</td>
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<td>Self-service for staff – both professional and academic</td>
<td>Self-service functions for students</td>
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<td>Improved curriculum management</td>
<td>Predictive functionality for students considering alternative academic pathways</td>
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Real-time visibility and advanced reporting help answer important questions to support student success and institutional planning.

- Query an accessible data store of advice, audits, and plans to help answer questions related to:
  - What is the breakdown of credits remaining to graduate?
  - How many students are planning to take this course?
  - How close are selected students to graduation, by percentage?

- The Curriculum Planning Assistant provides student data that enables institutions to plan for future course offerings and identify emerging enrollment patterns.

Student planning tools map out students’ academic journey to keep them on track for on-time graduation.

- Model degree plans can be assigned to individual students or a group.
- Simple to complex requirements can be built, including grade point average, test, course, non-course, and choice requirements.
- Clear on- and off-track indicators help advisors know when to intervene to help a student succeed.
- Students can register for classes directly from their Ellucian Degree Works plan, available out of the box with Ellucian XE-enabled Banner® by Ellucian.
Degree audits and tracking help students and advisors monitor progress toward degree completion.

- Clear visual indicators show whether a course requirement has been met or is in progress.
- Outstanding requirements are automatically displayed for courses not yet completed.
- Degree progress bars show where a student is on his or her academic journey.
- Degree audit worksheets, including the core academic, financial aid, and athletic eligibility audits are created on demand.

What-if and look-ahead analyses help students understand how courses and majors affect degree timelines.

- What-if audits show students their degree progress if they change their major.
- Look-ahead audits show students how their degrees would progress given assumptions on future course completions.
- Both types of audits can be performed simultaneously to gauge the effects of major and course decisions.
Advanced reporting tools
increase accountability and transparency.

- Track key performance indicators
- Create and publish trend analyses with ease
- Articulate strategy and goals with confidence, using data-supported evidence
- Share essential, timely data with key stakeholders and employees
- Provide accurate reports to regulatory bodies in real time
Implementing Banner
Implementing Banner

• Defining what we need

• Designing how it will work and what it will look like

• Learning how to use the system effectively
Who will be involved?

- Subject matter experts from across the University
- University project staff
- Ellucian consultants
- Key decision makers

What will be involved?

- Attendance at workshops to develop new processes
- Verifying and validating systems and processes
- Testing of the new system
- Developing training materials
- Communication and training activities
Stages of implementation

Q1 2018
• Project planning
• Defining Callista to Banner Data fields
• Data Migration planning

Q2 2018
• Design workshops commence
• Banner Student Technical Training
• Business process reviews

Q3 2018
• Design workshops continue
• Reporting workshops
• Banner Communication Workshops

Q4 2018
• Government Reporting
• Localisations
• Integration planning
• Admissions Consulting and Training

Q1 2019
• Enrolment Consulting & Training
• Curriculum Implementation simulation
• Banner Student Implementation

Testing

Data migration
Ongoing across the implementation
Q2 2019
• Banner Student Engagement Consulting & Training
• First enrolment simulations
• Localisations and Government Reporting

Q3 2019
• Enrolment simulations finalised July
• Enrolments new students available September

Q4 2019
• Go Live Support - Enrolments
• Finalise Banner Student (other modules)
• Data migration - current student cohorts (Dec19)

Q1 2020
• Banner SMS Live – Feb 2020
• Go Live Support

Q2 2020
• Move and Improve phase – ongoing training and support
A DISTINCTIVELY STUDENT-CENTRED UNIVERSITY
Supporting Securing Success
2017-2020 Strategic Plan

STUDENT MANAGEMENT SYSTEM GUIDING PRINCIPLES

MOVE AND IMPROVE
Ongoing improvement of business processes

STRONG GOVERNANCE
Consultation and guidelines to agree on clear decisions

ADOPT AND ADAPT
Adopt the Ellucian Banner system and adapt Western’s processes and policies

ANY DEVICE, ANYWHERE, ALL THE TIME
Cloud first, always mobile

ACTIVELY SIMPLIFY
Simplify, consolidate, and streamline our processes and technologies

ENABLE INNOVATION AND EFFICIENCY
Using tools and technologies to enable innovation; empowering users to promote self service and achieve process efficiency

CONFIGURE NOT CUSTOMISE
Use system settings and workflows; no changes to source code
## Project Governance

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<th>Project Board</th>
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<tr>
<td>Executive Project Sponsor</td>
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<td>Business Project Sponsor</td>
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<td>Board Member</td>
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<td>Board Member</td>
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<td>Board Member (Supplier)</td>
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Activities (at 16 February 2018)

• Discovery workshops completed for:
  • Curriculum rules
  • Class schedule management
  • General person and records management
  • General student records and processes
  • Admissions management and
  • Enrolment management

• Curriculum work – *linked closely to 21st Century Curriculum project*

• Stakeholder engagement

• Developing information and training resources
Staying up to date

Visit our website:
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• Join our Yammer Group
• Come along to information sessions