

# Compton College



Ellucian

Managed Services - Monthly Status Report

May / June 2020

## Accomplishments

| Completed Tasks  | Consultant Assigned             | Advisory Type                      | Notes   |
|--|---------------------------------|------------------------------------|---|
| <b>Banner Student</b>  |                                 |                                    |   |
| eTranscripts - Parchment/Credentials                                       | Shane Livingston                | Configuration Assistance, Training |   |
| National Clearinghouse   | Shane Livingston                | Configuration Assistance, Training |   |
| Ongoing Banner Student Support   | Shane Livingston                | Configuration Assistance, Training |   |
| <b>Financial Aid</b>   |                                 |                                    |   |
| New Aid Year roll  | Rodney Clements                 | Configuration Assistance, Training |   |
| Roll-over academic years   | Rodney Clements                 | Configuration Assistance, Training |   |
| Argos - Emergency Funds Request  | Rodney Clements                 | Deliverable                        |   |
| Promise Grant processing   | Rodney Clements                 | Configuration Assistance, Training |   |
| FinAid Automations   | Rodney Clements, Rogelio Vargas | Deliverable                        |   |
| CARES Act  | Rodney Clements                 | Configuration Assistance, Training |   |
| Satisfactory Academic Progress (SAP) Calculations                          | Rodney Clements                 | Configuration Assistance, Training |   |
| Covid withdrawal process   | Rodney Clements                 | Deliverable                        |   |
| Campus Logic   | Rodney Clements                 |                                    | FinAid verification and creation of award letters |
| Ongoing Financial Aid Support  | Rodney Clements                 | Configuration Assistance, Training |   |
| <b>ARGOS Reporting</b>   |                                 |                                    |   |
| The Solomon Act Report - Basic Student Demographics to Military Recruiters | Rogelio Vargas, Pradeep         | Deliverable                        |   |
| Equity Report - student enrolled in the program                            | Rogelio Vargas, Pradeep         | Deliverable                        |   |
| Room Usage Report  | Rogelio Vargas, Pradeep         | Deliverable                        |   |
| Graduation Report  | Rogelio Vargas, Pradeep         | Deliverable                        |   |
| AD Reporting   | Rogelio Vargas, Pradeep         | Deliverable                        |   |
| <b>Training</b>  |                                 |                                    |   |
| Deliver training for Degree Works  | Jen Vangilder                   | Training                           |   |
| Add ODSL On Demand Scribe Training to SharePoint                           | Cathy Proviano                  | Deliverable                        |   |
| Training for BAM - Distributed Security                                    | John Robbs                      | Training                           |   |
| SharePoint Site  | James Kirtley                   | Deliverable                        |   |
| <b>Banner Workflow</b>   |                                 |                                    |   |
| SSO Implementation   | Rogelio Vargas                  | Deliverable                        |   |
| Configure Workflow-Request Grade Change                                    | Rogelio Vargas                  | Deliverable                        |   |
| Determine Method for export  | James Kirtley                   |                                    |   |
| <b>Banner Access Management</b>  |                                 |                                    |   |
| Assistance with Configurations   | Rogelio Vargas                  | Configuration Assistance, Training |   |
| <b>Accounts Receivable Support</b>   |                                 |                                    |   |
| Cares Act Refund Adjustments   | Diana Heitman                   | Configuration Assistance, Training |   |
| Reviewed TGRCSHR report  | Diana Heitman                   | Configuration Assistance, Training |   |
| Reviewed how to Close and Finalize a Cashier Session                       | Diana Heitman                   | Configuration Assistance, Training |   |
| Reviewed the Scholarship process   | Diana Heitman                   | Configuration Assistance, Training |   |
| Term Based Accounting - Review and Decision                                | Diana Heitman                   | Configuration Assistance, Training |   |
| Refund Process Review and recommendations                                  | Diana Heitman                   | Configuration Assistance, Training |   |
| <b>Other Banner Support</b>  |                                 |                                    |   |
| Ethos API Management Center-Access error resolved                          | Rogelio Vargas                  | Issue Resolution                   |   |
| 1098T Processing   |                                 | Issue Resolution                   |   |

## Next Month Targets

| Remaining Tasks                                     | Assignment                         | Type                               | Notes   |
|---|------------------------------------|------------------------------------|---|
| <b>Banner Student</b>                               |                                    |                                    |   |
| Ongoing Student Support                             | Shane Livingston                   | Configuration Assistance, Training |   |
| Documentation for Student Account Process           | James Kirtley, Antonio Trepesowsky | Deliverable                        |   |
| <b>Financial Aid</b>                                |                                    |                                    |   |
| Cares Act Grant setup                               | Rodney Clements                    | Configuration Assistance, Training |   |
| Ongoing assistance                                  | Rodney Clements                    | Configuration Assistance, Training |   |
| GPA Upload  | Rodney Clements                    | Configuration Assistance, Training | Still waiting on confirmation from Keith that this task has been completed.                               |
| VA Process Flow - Finaid & AR                       | Rodney Clements                    | Configuration Assistance, Training |   |
| TD Client configuration Prod                        | Rodney Clements                    | Configuration Assistance, Training | Awaiting BANWORX permissions - Table in Automic where you have to list the jobs - DBA                     |
| Ongoing FA Support                                  | Rodney Clements                    | Configuration Assistance, Training |   |
| <b>ARGOS Reporting</b>                              |                                    |                                    |   |
| Other Reports                                       | Rogelio Vargas                     |                                    | Requests to define and prioritize other needed reports have not been answered                             |
| <b>Training</b>                                     |                                    |                                    |   |
| Accounts Receivable Documents in SharePoint         | Cathy Proviano                     | Deliverable                        |   |
| Finalize SharePoint site with Quick Reference Guide | Cathy Proviano                     | Deliverable                        | Still requires formal communication from Compton College to Banner user base of content availability      |
| <b>Legacy Transcripts</b>                           |                                    |                                    |   |
| Colleague Transcripts Pre 2005                      | Colleague Team                     | Deliverable                        | Awaiting SOW approval   |
| Legacy Images to BDM                                | Nick Sweeney                       | Deliverable                        | In progress - Oracle client needs installed on legacy system  |
| <b>Accounts Receivable Support</b>                  |                                    |                                    |   |
| Ongoing AR Support                                  | Diana Heitman                      | Configuration Assistance, Training |   |
| TGRAPPL Report Needs Clean Up                       | Diana Heitman                      | Configuration Assistance, Training |   |
| AR Reports  | Diana Heitman                      | Configuration Assistance, Training |   |
| Student Billing Process                             | Diana Heitman                      | Configuration Assistance, Training |   |
| <b>Other</b>  |                                    |                                    |   |
| AIP development for Associated Student Body (ASB)   | Rogelio Vargas                     | Deliverable                        | Configuration is complete, not in production. Awaiting client implementation. Around activity fee opt-out |

## Issues / Opportunities

- **Banner Operational Governance Between Departments**
  - Compton needs to create a Banner Governance body to coordinate student records processing decisions, identify policy gaps, and apply operational changes to Banner that are communicated across departments

## Issues / Opportunities (Continued)

- **Student Credit Card Payment Refund Balances**
  - Compton needs to develop a plan to distribute legacy refund balances in the system
  
- **LACO Finance Reporting**
  - Compton needs to complete development of operational process for accurate student revenue transaction posting “*actuals*” into the LACO Finance System from Banner GURFEED transaction tables
  
- **Banner Security**
  - Currently, segregation of duties and role-based permissions in Banner does not exist. Requires review now that Compton is past “*Startup*” phase
  
- **Compton Foundation – QuickBooks Usage**
  - Currently, Compton Foundation uses QuickBooks. This appears to have no integration with Banner or LACO Finance System. Needs review to determine if integration or data import/export is required.

## Key Contract Governance Discussion Points

- **Ellucian has agreed to one additional month of support from Managed Services Team. Engagement extension August 1, 2020 thru August 31, 2020 requires a signed agreement before 7/31/2020.**
  
- **Compton College has requested continued advisory engagement with Ellucian Services. An August Board agenda item (8/21/2020) will need to be created to obtain approval for a 1-year agreement:**
  - **Banner Student**
  - **Banner Financial Aid**
  - **Banner Student Accounts Receivable (A/R)**
  - **Banner Technical Support**
  
- **Initial engagement scoping efforts with Compton Leadership indicated hundreds of operational reporting requirements. After five (5) months Compton departmental leaders provided a list of less than twenty (20) reporting requests.**

We appreciate the opportunity to work with Compton College.