

Banner finance system lifts-off



Marianne Anderson

The staff is trained, we are into final testing and the last pieces are falling into place for the July 5 launch of YSU's SCT Banner finance system to the university community.

"But there's still work to be

done," said Marianne Anderson, who leads the finance team overseeing implementation.

This "special edition" of the YES Newsletter is designed to help answer questions, relieve anxieties, and guide users of the new SCT Banner finance system before and after "go live".

"Every effort is being made to provide the university community with as much support as possible in using the new finance system," said Eileen Greaf, co-project manager.

The YES website includes crosswalk tables with Advantage codes and the conversion to Banner FOAPALS under the link Advantage to Banner crosswalks.

Employees using the system can get quick, effective and friendly answers to their questions through the YES website and the new Banner Buddies program. Read more about these services in this newsletter.

As the "go live" date of July 5 approaches, Anderson's team has released a schedule of preparatory activities/deadlines.

June 20 – 24

- June 22 is the last day to submit invoices for payment against FY 2005 blanket purchase orders. FY 2005 blanket purchase orders will then be CLOSED and any invoices received after that date will be charged against FY 2006

- Complete integration testing
- Correct data or set-up problems
- Pre-live review with SCT Finance Consultant

June 27 – July 4

- June 27 will be the last day for FY 2005 budget transfers. Please review and make any necessary year-end budget "clean-up" transfers by that date. (Check the FY2005 Processing Deadlines for the entire schedule)

- July 1 end users will have view only access and ad hoc reporting to Advantage
- July 1– 4 selected members of the Finance team only will correct data or set-up problems

July 5

- Banner Finance system including Finance Self-Service goes live for the entire campus.
- Maintain documentation entered into the new system should it be necessary to return to the Advantage system the first week of the new production system

July 5-8

- Individualized assistance in Kilcawley training room all week

Other summer Banner events milestones include:

July 19 – 21

- Institution Luminis Kickoff
- Luminis Information Gathering

September

- Advancement Go-Live – September 1
- Phase II Finance begins (Budget Development, Fixed Assets, Grants Billing, Endowment Management)
- Student BPA (Business Process analysis) ■

Message from the President



David C. Sweet

As the "go live" date for YSU's SCT Banner finance system approaches, I want to take this opportunity to thank the dozens upon dozens of people who have worked so hard to

get us to this point.

The SCT Banner implementation, while not as visible as some of the other exciting things happening on campus, may be the most important project at the university over the next three years. The successful implementation of this new technology will go a long way to maintaining high quality instruction and services across campus for students, faculty and staff.

Getting the finance system up and running has been a long and sometimes arduous process, encompassing hundreds of hours of planning, training and energy. Your diligence and dedication are much appreciated. Due to your hard work, I know the finance system will be the first of a series of YSU Banner success stories.

YES website provides answers to most common Banner questions

Need to know what hours the new Banner finance system will be available?

Forgot how to process an online purchase requisition in the new system?

Need detailed information on a particular invoice?

A quick visit to the YES website at <http://www.yсу.edu/yes/> will help answer these and dozens of other questions to help smooth your trip through the new Banner

finance system.

Click on the "Restricted Area" of the website, enter the password, click on "YSU Training" and then click on "Finance Self-Service FAQ's," Frequently Asked Questions. There you will find nearly 50 of the most frequently asked questions about the new finance system and detailed answers. (Please see your supervisor or anyone on the YES implementation team if you do not have

the password to the restricted area of the website.)

"These questions were designed with the finance client in mind and should provide anyone using the system with quick answers to some of the most common questions that are sure to arise as the finance system goes live," said Donna Wainio, training team leader. ■

BANNER IN BRIEF



Donna Wainio

KILCAWLEY TRAINING ROOM AVAILABLE FOR USER SUPPORT

Donna Wainio, SCT Banner training team leader, will provide individualized assistance with the SCT Banner finance system starting July 5, the day the new

SCT Banner finance system is available to finance clients.

Wainio, with the assistance of finance staff, will be available 8 a.m. to 4 p.m. July 5 through 8 in the training room in Kilcawley Center.

"You are encouraged to bring your requisitions or transfer requests with you and someone will walk you through the process," she said.

TRACK YOUR TRANSACTIONS

While no effort has been spared to thoroughly test the new finance system, users must check all documents extensively for accuracy prior to issuing them to third parties. If you believe the system is not processing properly, please contact Marianne Anderson at extension 1716.

Got a question on the new finance system? Call your friendly campus Banner Buddy

Working in the new Banner finance system and come across a question you can't seem to answer on your own?

Call your Banner Buddy.

Banner Buddies are YSU staff available to help anyone on campus with questions about the new Banner Finance System.

The Buddies, strategically located in various departments throughout campus,

The Finance team is requesting that users maintain a file with the documentation of the transactions they enter into the new system for the entire first week, should it be necessary to return to the Advantage system.

"This is a routine precaution taken with the implementation of all new systems," said Dona Madacsi, co-project manager.

BANNER SELF-SERVICE HOURS

Banner is available daily from 6 a.m. to 12 midnight, except for the second Sunday of the month. Hours will change as more systems go live.

"ADVANCEMENT" NEXT ON THE BLOCKS

Once the finance system has safely taken off, the advancement system will move to the launching pad.

The Advancement system, which encompasses University Development and Alumni Relations, is scheduled to "go live" in September.

"We are making great progress," said Catherine Cala, team leader, "as the advancement team continues intense efforts testing the new system." ■

can help you access Banner, complete a purchase requisition or budget transfer, perform a query on your budget, help you find a document in the system or assist you with the approval of the requisition and/or budget transfer.

Listed below are Banner Buddies and how they can help. ■

If you have a question regarding:	Contact:	Ext:
Accessing the Banner website Resetting your Banner password Resetting your Banner account after it has been revoked Getting VPN software to access Banner from home	Tech Desk Staff	1595 techdesk@cc.yсу.edu
Getting a Banner account to access Banner Finance Changing the access you have in Banner Finance Changing the approval process in Banner Finance Information on the Banner Crosswalks from the YES website	Financial Services Marianne Anderson	1716 mcanderson@ysu.edu
Obtaining information on the purchasing process P-card charges against your budget	Materials Mgmt Jan Loychik	3164 jloychik@ysu.edu
Chargebacks against your budget	Gen Accounting Lisa Croyle	1919 lacroyle@ysu.edu
Invoices that have been processed against purchase orders	Accounts Payable Lois Catheline	1710 lacatheline@ysu.edu
Deposits	Student Accounts Tammy Blazak	3136 tmbblazak@ysu.edu
Transfer of funds	Budget Office Patty Seachman	1713 paseachman@ysu.edu
Training in Self-Service Finance	YSU Training Donna Wainio	1425 djwainio@ysu.edu

Luminis portal kicks off July 19



Bob Tupaj

The Luminis portal may sound like something out of a science fiction movie, but within the next year it will be a very exciting fact at YSU. Bob Tupaj, YSU web manager and team leader of the Luminis implementation, said Luminis is the product name used by SunGard SCT to describe its portal system – an internal, customizable web site that will provide YSU the ability to deliver personalized information and web services to students, faculty and staff.

"It will allow for quicker access to information that relates directly to the user," Tupaj said. Each user also will be able to add other items to their site, such as online newspapers, library resources, etc. Information such as campus announcements, e-mail and the campus events calendar will be available to all users.

The timeline for the implementation of the portal is set to begin July 2005 with a "go-live" date set for July 2006.

The implementation phase will "kick off" Tuesday, July 19 and will include "information gathering" meetings with focus groups for the purpose of determining what information and applications are important to each area of campus (i.e., admissions, student services, human resources, library, academics, etc.). Information gained through these sessions will assist the Luminis team in setting up the portal, Tupaj said.

The new Banner system is web-based which opens up more avenues for accessing information via the YSU web site with the help of Luminis. ■

Youngstown STATE UNIVERSITY

The YES newsletter is published by the Office of Marketing and Communications.

Ron Cole, Editor
133 Tod Hall, Youngstown, Ohio 44555-3519
330-941-3519 330-941-1704 fax
racole.01@ysu.edu