



East Carolina University Banner Implementation Project Definition

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Executive Summary

In January 2003, a kickoff meeting was held signaling the start of a Systems Development Life Cycle (SDLC) Analysis to determine the feasibility of SCT's Banner solution for East Carolina University (ECU). A series of activities occurred through May 2003 including SCT Banner module presentations (Advancement, Finance, Financial Aid, Human Resources and Student); "Discovery Days" conducted by SCT with various functional units to understand existing business processes; SCT Corporate and Banner briefing for the Banner Executive Steering Committee; "Town Hall" meetings to inform the campus community about Banner; Oracle database technical presentation; site visits to Old Dominion University, Thomas Jefferson Medical Center, Drexel University and SCT Corporate headquarters; and, presentations by various third-party add-on product vendors.

An exhaustive requirements document was developed for each module and submitted to SCT for response. A formal written analysis was produced with the end result being the recommendation to the Banner Executive Steering Committee to migrate all administrative systems to the Banner solution. This committee endorsed the recommendation and forwarded it to the Chancellor's Executive Council who then unanimously approved the recommendation on May 19, 2003 dependent upon a comprehensive funding plan.

Due to the significant state budget shortfall, ECU was faced with a cash flow issue and scaled back the original Banner proposal to include only the Finance, Financial Aid, Human Resources and Student modules with a discounted option purchase the Advancement module (as well as any other SCT add-on product) within the next two years. Presently, ECU is implementing the Banner Finance module with a targeted completion date of July 1, 2005. Implementation of the remaining modules will commence as funding becomes available.

The objectives of this project are as follows:

- Replace all existing mission-critical administrative systems (Advancement, Finance, Financial Aid, Human Resources and Student) to provide a more state-of-the-art technical infrastructure that will carry ECU forward into the foreseeable future with the anticipated growth of ECU.
- Provide more effective and efficient self-service applications for the growing needs of ECU's students, faculty and staff.

1. Introduction

1.1. Mission

This project is dedicated to implementing a fully integrated technology-based solution that will improve administrative processes and efficiencies and deliver an improved and expanded set of self-service applications for all ECU constituencies. It will be the catalyst for developing a structured and managed framework for change at the University.

1.2. Objectives

The objectives of this Project are to:

- Have easy access to information
- Refine business processes with improved operational efficiencies
- Have a fully-integrated administrative ERP system
- Bring the Project in on time and within budget;
- Workarounds without a loss of functionality
- Reduce annual maintenance costs of administrative systems
- Implement in a baseline/vanilla manner – departments will be responsible for evaluating SCT-delivered processes and redesign their business processes as necessary
- Eliminate redundant data entry
- Eliminate shadow systems throughout ECU
- Web-enabled processes accessible from anywhere and anytime
- Real-time access to information
- Eliminate dependency on batch processing
- Drill-down capabilities
- Eliminate paper where sensible
- Improve stores inventory functionality, interfacing w/other modules/bar coding
- Develop and implement common technical tools and technical foundation
- Provide a structured and managed framework for change
- Maintain compliance with external agencies
- Develop highly trained and functionally skilled staff and faculty
- Provide new and innovative services to constituents
- Provide improved reporting capabilities including:
 - User-friendly reporting tools with thorough understanding of data models
 - Availability of historical data

1.3. Benefits

The Benefits of this project include the following:

- Better enable decision-making
- Reduced workload on central staff
- Eliminate redundancy (data entry and administrative processes)
- Enables ability to work off-site for greater productivity
- Recruiting tool for attracting new staff

- Decrease annual software maintenance costs
- Greater standardization between modules
- Eliminate shadow systems throughout ECU
- Simplified training and daily system usage
- Eliminate multiple login I.D.s and passwords
- Move users closer to the information and attain end user ownership of their information
- Provide improved additional services to students, faculty, staff, alumni, parents and donors
- Enhance existing services
- Provide easier access to information for everyone
- Improve sharing and flow of information across all constituencies
- Improve understanding of university processes
- Improve and standardize documentation of university processes
- Develop a framework for initiating change
- Increase visibility in the community
- Integrated administrative systems residing on a state-of-the-art technical platform allowing for the future growth of ECU

1.4. History and/or Background

See Executive Summary.

1.5. Feasibility Recommendations

Funding has been approved for Banner Finance and the university is committed to implement the Banner Finance module.

1.6. Related Documents (Optional)

The project definition may refer to the following documents.

Document Name	Description/Location
Configuration Management Plan	
Collection and Analysis Methods	
Communication Plan	
Contingency Plan	
Defined Metrics	
Documentation Plan	
Feasibility Recommendations	
Integration Plan	
Organizational Readiness Plan	
Quality Assurance Plan	
Risk Report	
Services Requirements List	
Testing Plan	
Training Plan	
Training Material Plan	

“Location” identifies the physical location of the document (e.g., filename within a directory structure on a LAN server, database, or a binder on a bookshelf in an office).

2. Project Scope

The scope of the project is the following list of items:

Banner Finance:

- Implement the following systems:
 - Banner Finance by July 2005
 - Campus Loan Manager
 - Workflow
- Installation of Banner hardware, software, operating system, Oracle and associated functional and technical training
- Implement a university-wide reporting tool solution
- Perform a business process analysis for all critical Finance processes
- Investigate feasibility of Workflow and determine if it should be implemented with Finance for the July 2005 start-up.
- Implement a Cashiering system
- Data conversion (including analysis and planning) of current system data to Banner Finance
- Implement Campus Loan Management
- Implement Banner within the ECU OneStop Portal
- Implement Banner in a “vanilla” mode - policy change is preferable to native source code modifications
- Develop required interfaces between Banner Finance and all other appropriate systems
- Develop Banner upgrade procedures
- Converting and archiving data: populate Financial Services data warehouse via Banner Finance data
- Coordinate testing/development/production environments/training
- Develop standard procedure manuals
- Develop standard training manuals
- Meet all regulatory requirements
- Investigate feasibility of including/excluding Endowment Management
- Incorporate e~Print into Banner Finance for online report retrieval

2.1. Exclusions

The items listed below have been excluded from the original Banner ERP proposal as a direct result of constrained budget resources:

- Student
- HR, Position Control
- Financial Aid
- Advancement
- DataMart
- Strategic Enrollment

- Executive Self-Service
- Xtender solutions

However, the above exclusions and any other SCT product can be purchased at 70% of list price through December 2005.

2.2. **Planned Process Improvements**

The following process improvements are planned:

- Reduced paper in Purchasing
- Nightly batch processing elimination
- Improved (real time or more timely) access/availability of financial data
- Document Matching
- Implementation of electronic approvals with basic Banner Finance module/Workflow

3. **Project Milestones**

Listed below are major project milestones.

Milestone	Date
Project Started	10.21.2003
Hardware Installation	12.01.2003
Software Installation	12.19.2003
Project Definition Approved	12.15.2003
Project Schedule Complete	01.31.2003
Sign off on Chart of Accounts	05.30.2004
Project Go-Live	07.01.2005

4. **Project Budget**

4.1. **Introduction**

The university has committed that necessary funding for the complete implementation of the Banner Finance module.

4.2. **Budget Assumptions**

The Sr. Associate Vice Chancellor of Financial Services and the Project Director/Associate CIO will handle all budget issues, following a formal request process. Initial budget is sufficient to complete project.

4.3. **Budget Details**

Additional details are available by contacting Financial Services or the Office of the CIO.



5. Assumptions/Dependencies

Assumptions and Dependencies are items that are being presumed and are potentially out of our control.

5.1. Assumptions

Assumptions for this project are the following:

- Implement Banner in a “vanilla” mode - policy change is preferable to native Banner source code modifications
• Faculty, staff and executives are committed to the success of the project
• Scope document is complete
• SCT and ECU will dedicate adequate and appropriate human and financial resources to successfully complete the project
• All staff will have adequate functional and technical training
• Support hours and budget are sufficient to complete the Banner Finance project by July 2005
• All hardware and software required will be available and appropriate to support Banner
• Administration will allow release time for end-users to do the work required and assist in prioritizing workload
• The end-users will accept all necessary changes to successfully implement Banner Finance
• The moratorium on non-mandated changes to legacy systems will be enforced during the implementation
• All issues identified on the gap analysis as system-enabled are accurate
• The Banner Executive Steering Committee will act quickly on issues escalated to them for decisions
• Associated areas impacted by the Finance implementation will be available as needed to work on the project to bring it in on time
• SCT standard methodology will be used throughout the project
• All systems reliant upon Finance data will be evaluated for interface

5.2. Dependencies

5.2.1. Dependent Projects

Table with 3 columns: Project Name, Expected Completion Date, Reason for Dependency. Rows include Statewide E-Procurement, Student Stores, Parking and Traffic System, and Enterprise Reporting System.

5.2.2. Dependent Products

<u>Product Name</u>	<u>Release Number</u>	<u>Release Dependency is Higher</u>	<u>Reason for Dependency</u>
Sun hardware			Core Product
Sun Solaris 9			Core Product
Banner Finance			Core Product
Oracle 9i			Database for Banner
Reporting Tool (research)			End-User access to data
Job scheduling tool (Appworx)			Not necessarily needed, but desired, for Banner Finance
Campus Loan Manager			Core Product
OneStop Portal			ECU/Banner will utilize OneStop (not Luminis)
Data Migration Toolkit			Streamline migration of data from existng system to Oracle database
E-Print			Electronic report distribution
Forms vendor (e.g., E-Visions)			Needed to improve process flows in Banner Finance
SCT Workflow			Needed to improve process flows in Banner Finance
CPNS credit card processing			Needed to improve process flows in Banner Finance

5.2.3. Dependent Resources

People and material resources required for which the project is dependent upon:

- Chancellor’s Executive Council
- Banner Executive Steering Committee
- SCT resources
- Functional and Technical representatives from:
 - Accounts Payable Dept.
 - Endowment Management
 - Fixed Assets
 - General Accounting and Budget
 - Grants and Contracts
 - Health Sciences Division
 - Human Resources Cashiering
 - Purchasing
 - Research
 - Stores Inventory
 - Student Loans
 - Student Receivables
 - Systems Administration/Infrastructure
- Banner Project Director
- Administrative Assistant to Banner Project Director

- ECU IT Project Leader
- ECU Functional Project Leader
- ITCS Systems Staff
- ITCS Networking Staff
- Banner Training Coordinator
- SCT Project Manager
- SCT On-site Consultant
- ECU Internal Auditor
- State Agencies and University General Administration
- Project Documentation from Banner
- ECU OneStop Portal representative
- Training Facilities (computers, whiteboard, printer, connectivity)
- Backfill functional support

6. Project Constraints

6.1. Project Constraint Details

The following constraints exist for this project:

- Scope: ECU is willing to decrease the scope of this project if absolutely necessary to remain on schedule for a July 2005 Banner Finance “Go Live” date.
- Quality: Quality is not to be sacrificed at any level
- Schedule: constrained due to administrative directive
- Chart of Accounts development may be constrained as the UNC Alliance works toward a standard for all institutions.

7. Risks

This section identifies the risks to the project with respect to the environment, user expectations, competing projects, project assumptions, resources and other relevant matter. Approaches to responding to risks include **Deflection** (transferring the risk to another party), **Control** (minimize the effect), **Retention** (accept the consequences), and **Avoidance** (reject the risk; do nothing).

Risk	Probability of Occurrence* (A)	Estimated Project Impact** (B)	Weight B+(A-1)	Issue or Jeopardy Control No.	Mitigation Strategy***	Contingency
Overextension of resources	Very Likely (3)	Critical (2)	4		Control & Retention	ECU to determine
Lack of personnel	Very Likely (3)	Critical (2)	4		Control & Retention	ECU to determine



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resources						
Scope creep	Probable (2)	Catastrophic (3)	4		Control	Controlled and escalated to Steering Committee
Regulatory mandates	Very Likely (3)	Critical (2)	4		Retention	
Staff resistance to change	Very Likely (3)	Marginal (1)	3		Control	Change Management/ Communications Planning
Perceived loss of functionality	Very Likely (3)	Marginal (1)	3		Control	Communicate Benefits frequently to correct stakeholders
Staff turnover	Probable (2)	Critical (2)	3		Control & Retention	Cross-train where possible
Vendor will not exist	Unlikely (1)	Catastrophic (3)	3		Retention	
Weather-related occurrences	Probable (2)	Marginal (1)	2		Control	Compress the Schedule Disaster Recovery Plan
Low data integrity	Unlikely (1)	Critical (2)	2		Control	Decisions on when/how/if to fix
Funding loss	Unlikely (1)	Catastrophic (3)	3		Control	Identify alternate sources of funding – Steering Committee Reduce Scope Reduce SCT involvement
Timely interfaces	Unlikely (1)	Critical (2)	2		Control	Early planning for all interfaces
Steering Committee does not make timely decisions	Unlikely (1)	Catastrophic (3)	3		Control	Compress schedule
Hardware capacity insufficient	Probable (2)	Catastrophic (3)	4		Control	Purchase/upgrade hardware
Hardware usability	Unlikely (1)	Catastrophic (3)	3		Control	Evaluate Purchase
External influences	Probable (2)	Catastrophic (3)	4		Control	Communications with all affected
State IT Audit	Very Likely (3)	Marginal (1)	3		Control	Compress Schedule
Non-successful data conversions	Unlikely (1)	Catastrophic (3)	3		Control	Testing and validation, user involvement, early planning
Inadequate functional and technical training	Unlikely (1)	Critical (2)	2		Control	ECU to provide additional funding for additional training
Loss of SCT commitment	Unlikely (1)	Critical (2)	2		Control	Escalate to Steering Committee; Hire other Consultants; ECU staff will assume responsibilities
Inaccurate Gap Analysis	Very Likely (3)	Critical (2)	4		Control	Consulting
Underestimation	Very Likely	Catastrophic	5		Control	Consulting/other resources



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of complexity	(3)	(3)				
Inability of project team to resolve issues	Probable (2)	Critical (2)	3		Control	Consulting/other resources
Insufficient Communication to constituencies	Probable (2)	Critical (2)	3		Control	Good, well-executed communication plan

***Probability guidelines:**

- Very Likely 70-100% A = 3
- Probable 40-70% A = 2
- Unlikely 0-40% A = 1

****Impact guidelines for scope, cost, schedule, or quality:**

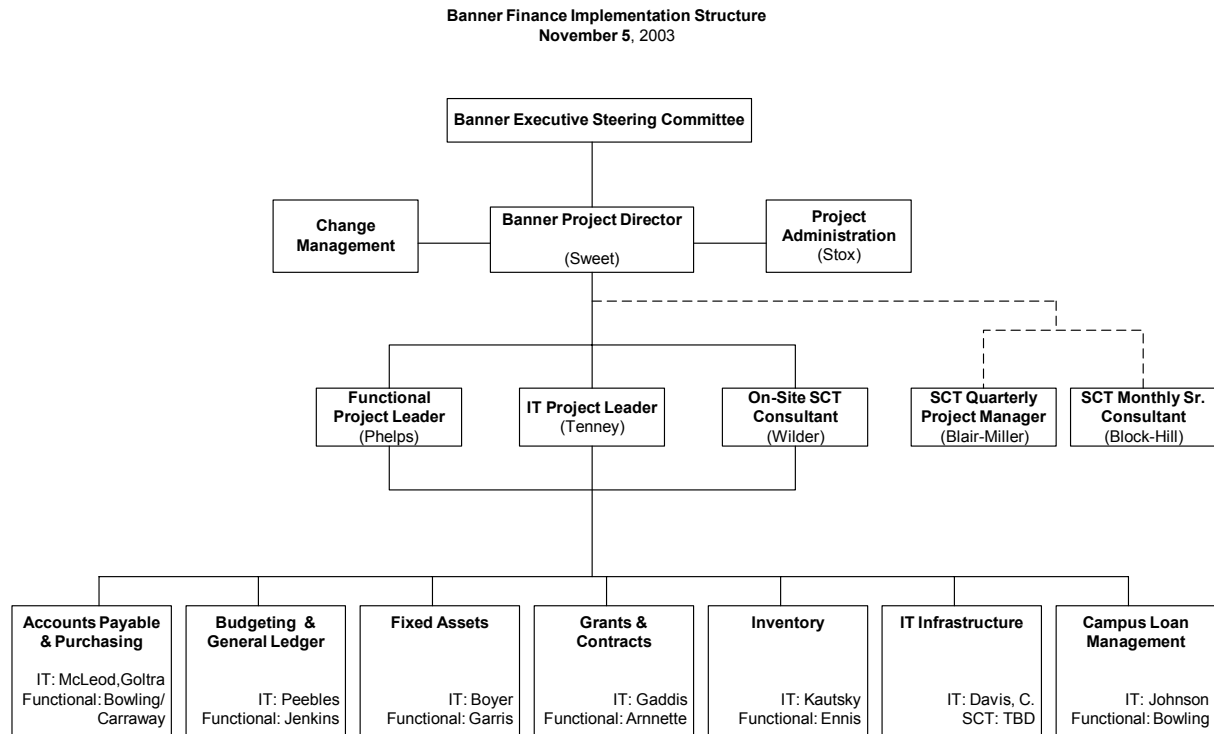
- Catastrophic B = 3
- Critical B = 2
- Marginal B = 1

*****Mitigation strategies:**

- Deflection: transfer all of a portion of the risk to another party
- Retention: willing to accept consequences
- Control: do best to minimize occurrence and effect
- Avoidance: reject this option because of potentially unfavorable results

8. Project Organization

8.1 Project Organization Chart



8.2 Project Team

Personnel involved that will provide assistance on this project.

Role	Member(s)	Title	Role Responsibilities
Sponsor: Chancellor's Executive Council	William Shelton	Interim Chancellor; Chair	Provides the highest level of university support and oversight for the SCT Banner project toward a successful implementation. This is where the final decision is made on whether to implement part, all or none of the SCT Banner modules. The decision will be based on recommendations from the SCT Banner Executive Steering Committee
	Brown, Richard	Exec. V.C. Admin. & Finance	
	Bunch, Austin	Chief of Staff	
	Harrell, George	Sr. Assoc. V.C., Facilities Administration	
	Hawkins, Chuck	Sr. Assoc. V.C., Financial Services	
	Huskamp, Jeff	Chief Information Officer	
	Lehman, John	Acting V.C., Research Graduate Studies	
	Lewis, Michael	V.C., Heath Sciences	
	Moore, Garrie	V.C. Student Life	



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	Smith, James	Interim, VC Academic Affairs & Asst. Secretary to Board of Trustees	
	Thompson, Bob	Director, Institutional Planning, Research & Effectiveness	
Executive Steering Committee	Huskamp, Jeff	Chief Information Officer; Chair	Provides full support to this project and serves as the institutional champion for a complete analysis of the SCT Banner offering. If the SCT Banner suite is approved for purchase and implementation, this committee will monitor milestones planned and achieved including the overall project budget. This committee will resolve process & policy changes that cannot be readily resolved by the project management team. The SCT Banner Executive Steering Committee will accept recommendations from the Project Management Team as input to a final recommendation to the Project Sponsor.
	Brinn, Jack	Associate V. C. Health Sciences Info. Systems	
	Mize, Nance	Assistant V.C., Univ. Unions	
	Sessoms, Clayton	Associate V. C., Distance Ed.	
	Hawkins, Chuck	Sr. Associate V.C., Financial Services	
	Kane, Emile	Director, Office of Sponsored Programs	
	Lucier, Aaron	Interim Associate Director, Campus Living	
	Mullen, James	Interim Associate V. C., Human Resources	
	Peel, Henry	Vice Provost Academic Services	
	Sweet, Don	Assoc. CIO & Director, IT Software Development Svcs.	
	Thompson, Bob	Director, Institutional Planning, Research & Effectiveness	
	Tronto, Stacie	Interim Director, Office of the Internal Auditor	
Uhr, Ernest	Dean, College of Business		

Role	Members(s)	Title	Role Responsibilities
Project Director	Sweet, Don	Assoc. CIO & Director, IT Software Development Services	The ECU liaison with SCT and 3 rd party vendors and coordinates all activities associated with the analysis of Banner, the development of a projected budget over the life of the project, vendor negotiations and the generation of the final document assessing the SCT Banner product.
Admin. Assistant	Stox, Sue	Banner Admin. Assistant	
Finance Process Teams	Phelps, Nancy	Functional Project Leader	These Process Team leaders will recruit knowledgeable and experienced staff (work teams) to assist, as requested and necessary, toward the successful implementation and testing of all components of the Banner
	Tenney, Donnie	IT Project Leader	
	Bowling, Dee McLeod, Kaki	Funct. Lead (A/P) IT Lead (A/P)	
	Carraway, Kevin Goltra, Kim	Funct. Lead (Purchasing) IT Lead (Purchasing)	

	Jenkins, Anne Peebles, Patty	Funct. Lead (Budget, G/L) IT Lead (Budget, G/L)	Finance module. This will also include refinement and/or changes to existing procedures
	Garris, Elaine Boyer, Terry	Funct. Lead (Fixed Assets) IT Lead (Fixed Assets)	
	Arnette, Ella Gaddis, Jim	Funct. Lead (Grants/Contracts) IT Lead (Grants/Contracts)	
	Ennis, Perry Kautsky, Joe	Funct. Lead (Inventory) IT Lead (Inventory)	
	Bowling, Dee Johnson, Venus	Funct. Lead (CLM) IT Lead (CLM)	
	Davis, Carol	IT Infrastructure	

8.3 Participating Departments

This section identifies the participating departments or third parties who may be affected or positively impact the success of this project.

Department/Third Party Name	Name (if known)
Financial Services	
Human Resources	
Student Life: Technical & Functional	
Health Sciences	
Advancement	
Interface Teams	
User Test Groups	

8.4 Change Control Board(s)

The Change Control Board will be the Banner Executive Steering Committee. Further details regarding Change Management are identified in the Configuration Management Plan.

9. Project Approach

Implementation of Banner Finance will follow the SCT Common Services Methodology.

9.1 Define

ECU and SCT collaborated on the initial Project Definition Document with ECU fine-tuning the document for completion.

9.2 Plan

The following steps will be followed to plan the project:

- Create and finalize the Project Definition Document
- Obtain ECU executive management acceptance of the Project Definition Document
- Develop the Project Schedule including consultant visit dates
- Develop the functional and technical education and training plans
- Execute plans toward successful implementation

9.3. **Implement**

ECU will follow SCT's project methodology for the project duration. The following high-level activities will be conducted:

- Hardware installation
- Software installation
- Business Process Analysis (especially of the Gaps identified during the Requirements Phase of the Banner Analysis Systems Development Life Cycle)
- System education (functional and technical)
- System implementation (test/training platform)
- Data conversion/mapping
- System and unit testing
- Interface development and testing
- User acceptance
- Training end-users
- "Go Live"

9.4. **Close-Out**

The Project Director will sign off on all close-out documentation compiled by each process team. The purpose of the close-out process is to determine if objectives were met; ensure efficiencies (mainly in the functional units) were gained over the previous system; ensure all critical incidents have been resolved; and ensure that users are fully trained.

9.5. **Change Management**

Refer to the Configuration Management Plan.

9.6. **Documentation**

SCT application documentation will be used primarily. If site-specific documentation proves necessary, it will be created by ECU (a training coordinator is planned for hire). All documentation will be available for access by ECU staff on a central server.

9.7. **Communication**

Communication regarding the progress of the project will occur through the following methods:

Project Members:

- Central server holding all documents (status reports, minutes, trip reports, etc.)
- Process/work team listservs
- Meetings
 - Project Director with Functional & IT Project Leaders (monthly)
 - Functional & IT Project Leaders with Process Team Leaders (bi-weekly)
 - Process Team Leaders w/ Work Team members (bi-weekly)

- Executive Steering Committee (monthly/as requested)

ECU Community:

- ECU Project web site
- ECU's "ANNOUNCE" distribution list as appropriate
- Periodic "Newsletter" formats to celebrate milestones and to highlight features of the system
- Administrative Computing Council (monthly)
- Information Resources and Computing Council (monthly)

9.8. Measurement

The project will be measured against the following:

- Milestone dates met as projected in the implementation plan
- Actual vs. planned budget
- Project deliverables met
- Project objectives met

9.9. Organizational Readiness

Refer to the Organizational Readiness Plan.

9.10. Project Environment

The Project Environment consists of the following:

- Enterprise Server room (fully secured)
- 13-workstation training facility (including one trainer station)
- "War Room" being explored for duration of project
- Functional and IT staff offices and workstations

9.11. Quality Assurance

Refer to the Quality Assurance Plan.

9.12. Tracking

Project tracking will occur mainly via meetings as follows:

- Project Director with the Functional & IT Project Leaders (monthly)
- Functional & IT Project Leaders with Process Team Leaders (bi-weekly)
- Process Team Leaders with Work Teams (bi-weekly)
- Executive Steering Committee (monthly/as requested)

In addition, the Project Director will track progress continually.

9.13. Risk Management

Risks are identified at the beginning of the project and throughout the project. When a Risk is identified, Mitigation Actions and Contingency Plans are developed and recorded

in the Work Product's database. The Project Manager manages the Risks by executing Mitigation Actions, which may include how the contingency plans will be implemented and how the reserves will be allocated. If a Risk materializes, it is escalated to a Project Issue or Jeopardy by executing the Identify and Resolve Issues or Identify and Resolve Jeopardies activities. Risk Contingency Plans may become the Project Issue or Jeopardy Action Plan.

10. System Requirements

SCT has provided ECU with all system requirements as described in the order form. Detailed system requirements will not be documented here.

11. Project Deliverables

Project Definition Document
Configuration Management Plan
Project Implementation Schedule
Quality Assurance Plan
SCT Services Requirements List
System Education Plan
Testing Plan
Training Plan
Finance post implementation review

12. Project Success Criteria

The project success criteria include the following:

- All issues and action items have been completed and signed off
- All required work products have been produced
- All deficiencies have been logged and signed off
- Verification that the project has met project and Organizational Entity standards
- Validation that the product meets the requirements
- Project was implemented on time
- Project was implemented within budget
- The project has validated that all major commitments and deliverables have been closed.



13. Approval to Proceed

Approval from the Banner Executive Steering Committee Members.

By signing this document I acknowledge I have read the document and give the Project my approval to proceed:

Name Jeff Huskamp
Title Chair, CIO
Date

Name Jack Brinn
Title Associate V.C. Health Sciences I.S.
Date

Name Nancy Mize
Title Assistant V.C., University Unions
Date

Name Clayton Sessoms
Title Assoc. V.C., Distance Education
Date

Name Chuck Hawkins
Title Sr. Assoc. V.C. For Finance
Date

Name Emile Kane
Title Interim Dir., Sponsored Programs
Date

Name Aaron Lucier
Title Interim Assoc. Dir., Campus Living
Date

Name James Mullen
Title Interim Assoc. V.C., H.R.
Date

Name Henry Peel
Title Vice Provost, Academic Services
Date

Name Don Sweet
Title Assoc. CIO, Dir., Software Dev.
Date

Name Bob Thompspon
Title Dir., Institutional Planning, Research
& Effectiveness
Date

Name Ernest Uhr
Title Dean, College of Business
Date

Name Kathryn Yandell
Title Interim V.C., Institutional
Advancement
Date

Name
Title
Date



Document History

Revision Record

Number	Date and Sections	Author	Notes



14. Acronyms

Acronym	Description
CSM	Campus Loan Management
ECU	East Carolina University
ERP	Enterprise Resource Planning
ITCS	Information Technology & Computing Services
SCT	Systems & Computing Technology Corporation (vendor for Banner)
SDLC	System Development Life Cycle
UNC	University of North Carolina system
