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FOOTHILL-DE ANZA
Community College District

Strategic Analysis
Human Resources / Position Control / Budgeting
September 14 – 16, 2009

UDC Specialist	**Cydney Hawkins** **Cyd.hawkins@sungardhe.com** **503/329-9970**
Recommended Participants	• Human Resources implementation team • Key personnel that deal with employment, compensation management and/or position control and position budgeting/encumbrancing processes • Technical staff responsible for support of Banner HR

Monday, September 14, 2009

8:30 AM -12:00 Noon

Introduction
Welcome
Announcements
Review agenda and plan for the week

Review Business Processes

"Review of business processes" will focus on those items as they relate to the open items/issues that exist with the Banner EIS implementation of the Human Resources/Position Control solutions. Input to the sessions will include review of the EIS Open Issues and Items log as they relate to the Human Resources/Position Control implementation and the overall enterprise requirements and processes. The process during Monday and Tuesday's sessions will incorporate, as appropriate, modeling and configuring the Banner baseline solution (working through business scenarios) or identification of the technique for resolution.

- Review open items and issue log
- Brief update on the status of open items and validation of the date resolution is required.
- Identification of the owner for resolution
- Prioritization of items and the required date they must be in production based on the FHDA business cycle

*** Note: The list of items will be refined throughout the three days as decisions/requirements are defined/refined or the method for resolution is agreed upon. ***

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1:00 PM – 4:30 PM

Review **Business Processes**

Continued reviewing business requirement. The afternoon session will focus on the encumbrance, lapsing and budgeting requirements. Items to be include:

- Part time faculty compensation
- Shift differential requirements
- Leave hours exceed base pay
- Leave hours by job—multiple position assignments and processing of leave
- T3s and prior period adjustments
- Baseline faculty load and compensation (note this a precursor to the joint HR/PR and Student touch point session scheduled for 10/9/2009)

Tuesday, September 15, 2009

8:30 AM - 12:00 Noon and 1:00 PM – 2:45 PM

Review **Business Processes**

Continue reviewing business processes. Areas to be discussed include:

- Position Control budgeting requirements (referring the data stored on the Banner form NBAPBUD)

  - Data requirements—reporting versus online (from within NBAPBUD)
    - *Who needs the data, in what format, when*
    - *Audit requirements*
    - *NBAJOBS→NBAPBUD data flow: Discuss concept to update budget data within NBAJOBS, automatically update NBAPBUD budget detail.*
  - Lapsing data analysis requirements—changes in budget stemming from resignations, new employee assignments to positions. Criticality during the period when 'float' is being critiqued in regard to data analysis supporting workforce reduction decisions
  - Modeling—requirements for future year analysis e.g. creation of a modeling environment, which has no impact on production, but can be used for 'what if' analysis supporting strategic budgeting requirements

- Review of Salary Planner functionality and its application to the business model

3:00 PM - 4:30 PM

Go Live Readiness

Review "Go Live" Checklist
Identify Areas of Concern

Wednesday, September 16, 2009

8:30 AM - 12:00 Noon

Continue Go Live Readiness

Identify Areas of Concern

1:00 PM - 4:00 PM

Plan / Timeline / Tasks

Review Plan / Timeline and Assign/Adjust Resources as Required
Validate changes/additions to the open issues and items log

4:00 PM - 4:30 PM

Trip Summary
Wrap up
- Response to specific requests or identification of needs
- Questions - open forum on all topics
- Planning for next visit