

BANNER DOCUMENT MANAGEMENT (BDM)



Presented by: Pam Grey, Ellen Lyon
and Chien Shih

Agenda

- Overview of project with a focus on the purchasing process
- Development of taxonomy
- Accounts Payable
- Security
- Next steps



What the BDM pilot includes

- The lifecycle of purchase requisitions



- Vendor Set-up
- W9 & W8



What is not included

- Independent Contract Agreements (w/o POs)
- Direct Pay
- Historical documents



Current state

- Two user groups
 - INB (super users)
 - SSB (majority of users)
- Hybrid of electronic and paper workflow
- Issues
 - Lost documents and lag time
 - Physical storage limitations
 - Access to files
 - Touching documents multiple times
 - Difficulty sorting documents for destruction



Why are we doing this

- Reduce costs by capturing paper-based content and converting it into electronic images
- Minimize inefficiencies by making information easier to find and share
- Improve security by applying more consistent retention policies across campus and limiting access



Team and milestones

- Project Team
 - Representation from each stakeholder group
- Steering Committee
 - C-level representatives
- Project Milestone Dates

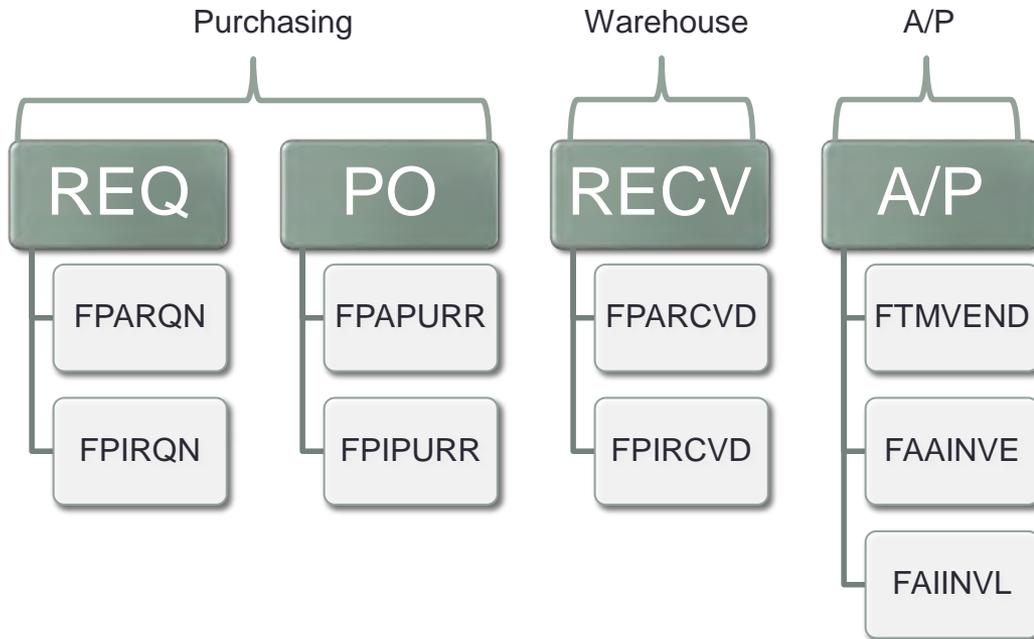


Developing taxonomy

- Selected ETS to do beta testing
- Key Banner documents central to all members of the group were reviewed and discussed
- A pilot group of staff from ETS, Purchasing, Plant Services and Accounts Payable began testing



INB



SSB



Documents may also be viewed in FOIDDOCH



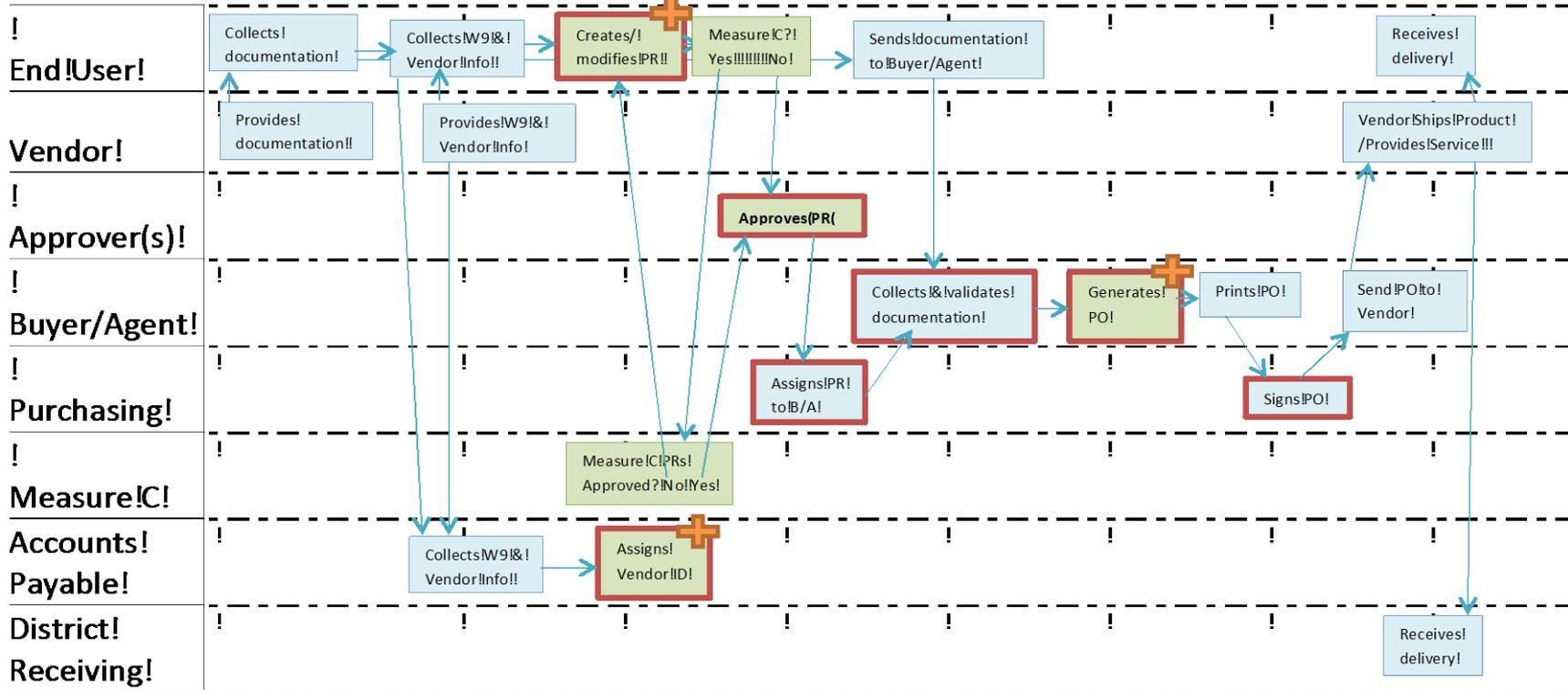
B form listed.

January 27, 2014



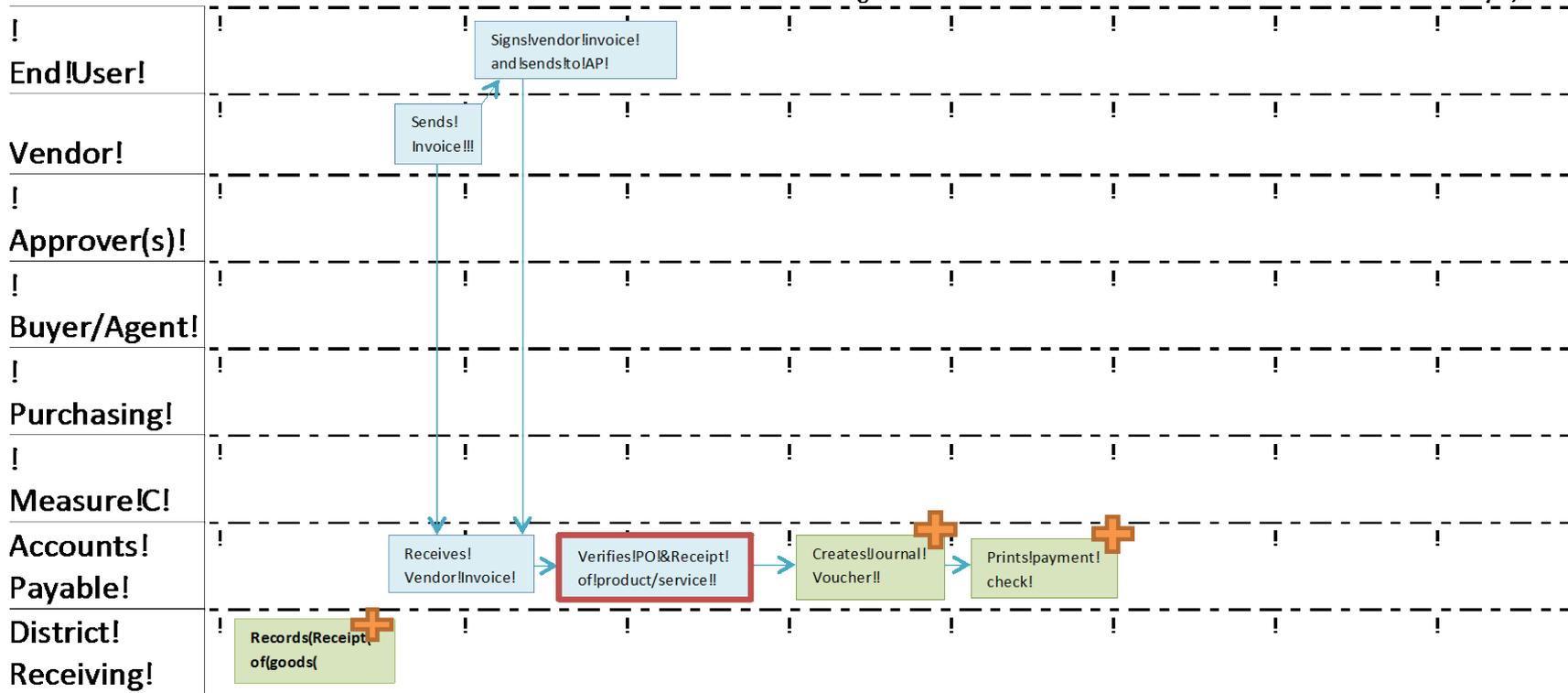
Pre-BM Purchasing Workflow

January 7, 2014



Pre-DM Purchasing Workflow

January 7, 2014







FOOTHILL-DE ANZA Community College District

My Account
Content Layout
Welcome Pamela Sue Grey
You are currently logged in.

Groups Logout Help

- Home
- Employees
- Students
- Registration
- Banner**
- Reports

April 24, 2014

Approval Alerts

Requisition:	1
Total:	1

Next Approver All Documents

Banner Applications

- Internet Native Banner**
Open a PROD INB session in a new window
- Banner Self-Service**
Open the web services main menu
- Banner Reports**
View, search, and print output from Banner jobs and processes
- Banner Document Management Suite**
View and search archives of scanned documents
- Faculty Leave and Sub Pay**
Advanced workflow for faculty leave reporting
- Active Roster Administration**
Advanced faculty rosters

Finance Services

- Create a Requisition
- Check Available Balance

Banner Training

Interactive web training sessions are now available for Banner software components. Click on any of the URLs below for the training session you would like to view. It will load within your Luminis window. *Note: Flash Player is required.*

For user instructions click [HERE](#).

- Banner Fundamentals
- Finance
- Financial Aid
- Human Resources
- Student

Course Monitoring

- Look up Classes**
Get a department overview of courses

Open Classes Finder

Quickly locate open and newly added classes.

Term & College:

[Browse Course Listings](#)

DegreeWorks

[Launch DegreeWorks](#)

Banner Resources

- IFOAP Search
- Chart of Accounts Crosswalk - FRS to Banner

Foothill-De Anza Community College District MyPortal

Back to Banner Tab

Groups Logout Help

Personal Information Employee Finance

MENU SITE MAP HELP

View Document

To display the details of a document enter parameters then select View document. To display approval history for a document enter parameters then select Approval history. If you do not know the document number, select Document Number to access the Code Lookup feature. This enables you to perform a query and obtain a list of document numbers to choose from.

Choose type: Requisition Document Number R0008736 Submission#: Change Seq# Reference Number

Display Accounting Information Yes No Display Document/Line Item Text Display Commodity Text All Printable None All Printable None

View document Approval history

[Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document | Budget Transfer | Multiple Line Budget Transfer | Delete Finance Template]

MyPortal / Foothill-De Anza College District

https://myportal.fhda.edu/render.UserLayoutRootNode.up7uP_tparam=utf&utf=%2Fcp%2Fip%2Flogin%3Fsys%3Dscstsb%26url%3Dhttps... man behind the curtain

Most Visited myportal.fhda.e... California Legist... ETS Help Desk Foothill-De Anz... Facilities Purchasing Doc... boarddocs Accounting Serv... Bay Area Purcha...

Foothill-De Anza Community College District | MyPortal

Back to Banner Tab Groups Logout Help

Personal Information Employee **Finance**

MENU SITE MAP HELP

View Document

Requisition Header

[Display Documents](#) [Upload Documents](#)

Requisition	Order Date	Trans Date	Delivery Date	Print Date	Total
R0008736	Apr 15, 2014	Apr 15, 2014	May 20, 2014		1,087.50

Origin: SELF_SERVICE

Complete: Y Approved: N Type: Procurement

Cancel Reason: Date:

Requestor: 419000 Material Services

Phone Number:

Accounting: Document Level

Ship to: Foothill-De Anza CCD
District Receiving, Bldg D170
12345 El Monte Rd
Los Altos Hills, CA 94022

Attention: District Shipping & Receiving

Contact: District Shipping & Receiving

Phone Number:

Vendor:

Phone Number:

Fax Number:

ApplicationXtender Web Access .NET

https://bandoc.fhda.edu/appXtender/BatchView.aspx

File View Batch Page Help

B-F-DOCS - 20182683 - 4/16/2014 2:37:29 PM

Page 1 Zoom 100%

Index Name	Field Value
DOCUMENT ID	R0008736
BANNER DOC TYPE	REQUISITION
DOCUMENT TYPE	
TRANSACTION DATE	15-Apr-2014
VENDOR ID	00010778
VENDOR NAME	
FIRST NAME	
PIDM	274925
ROUTING STATUS	
ACTIVITY DATE	2014-04-16 14:43:34

Save

DE ANZA COMMUNITY COLLEGE DISTRICT

Board of Trustees Agenda Item

Meeting Date: February 6, 2012

SALE OF MISCELLANEOUS SURPLUS ELECTRONIC EQUIPMENT

Background and Analysis:

The District has eighteen pallets of computers, monitors, printers, and miscellaneous electronic equipment (See attached Surplus Forms, 13 pages). The District's Educational Technology Services Department (ETS) staff has determined that the items are obsolete and of no further use to the District. DeAnza College Occupational Training Institute has also found them to be unsuitable for further use. In accordance with the Electronic Waste Recycling Act these items are considered electronic waste. The estimated aggregate market value of this electronic equipment is less than \$5,000.00.

California Education Code 81452(a) provides that if the governing board by a unanimous vote of those members present, finds that the property, whether one or more items, does not exceed in value the sum of five thousand dollars (\$5,000.00), the property may be sold by any employee of the District empowered for that purpose by the board.

Purchasing Services will post a notice on Bid Net and call for competitive bids from authorized State of California material handlers, collectors, and recyclers. Proceeds will be deposited to the District's general fund.

Recommendation: (specify if information only)

Make a finding that the property does not exceed \$5,000.00 in value and authorize the Director of Purchasing Services to sell the items in accordance with Education Code 81452(a).

Submitted by: [REDACTED]

Additional contact: [REDACTED]

Is backup provided? Yes

Page 1

Page 2

Page 3

Page 4

Page 5

Banner Document Type is hard coded

ApplicationXtender Web Access .NET

https://bandoc.fhda.edu/appXtender/BatchView.aspx

File View Batch Page Help

B-F-DOCS - 20182683 - 4/16/2014 2:37:29 PM

Page 1 Zoom 100%

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VENDOR NAME	
FIRST NAME	
PIDM	274925
ROUTING STATUS	
ACTIVITY DATE	2014-04-16 14:43:34

Save

FOOTHILL-DE ANZA COMMUNITY COLLEGE DISTRICT

Board of Trustees Agenda Item

Board Meeting Date: February 6, 2012

CELLANEOUS SURPLUS ELECTRONIC EQUIPMENT

and Analysis:

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Recommendation: (specify if information only)
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Submitted by: [Redacted]
Additional contact: [Redacted]
Is backup provided? Yes

Page 1
Page 2
Page 3
Page 4
Page 5

Document Type is custom and can be changed

ImplementationTeam.pdf MyPortal / Foothill-De Anza Col...
 https://myportal.fhda.edu/render.UserLayoutRootNode.uP7uP_tparam=utf&utf=%2fcp%2fip%2flogin%3fsys%3dsctsb%26url%3d Google
 Most Visited myportal.fhda.e... California Legis... ETS Help Desk Foothill-De Anz... Facilities Purchasing Doc... boarddocs Accounting Serv... Bay Area Purcha...

Foothill-De Anza Community College District | MyPortal

Back to Banner Tab

Groups Logout Help

Personal Information Employee **Finance**

MENU SITE MAP HELP

Approve Documents

i Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document. Select the Approve link, if enabled, to approve the document. Select the Disapprove link, if enabled, to disapprove the document.

Queried Parameters

User ID: [Redacted]
 Document Number: [Redacted]
 Documents Shown: All

Approve Documents List

Next Approver	Type	NSF	Change Seq#	Sub#	Originating User	Amount	Queue Type	Document Number	History	Approve	Disapprove
Y	REQ				[Redacted]	1,087.50	DOC	R0008736	History	Approve	Disapprove



Another Query

[[Budget Queries](#) | [Encumbrance Query](#) | [Requisition](#) | [Approve Documents](#) | [View Document](#) | [Budget Transfer](#) | [Multiple Line Budget Transfer](#) | [Delete Finance Template](#)]

Release: 8.3

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Foothill-De Anza Community College District | MyPortal

Back to Banner Tab Groups Logout Help

Personal Information Employee **Finance**

MENU SITE MAP HELP

View Document



Requisition Header

Display Documents Upload Documents					
Requisition	Order Date	Trans Date	Delivery Date	Print Date	Total
R0008736	Apr 15, 2014	Apr 15, 2014	May 20, 2014		1,087.50
Origin:	SELF_SERVICE				
Complete:	Y	Approved:	N	Type:	Procurement
Cancel Reason:				Date:	
Requestor:			419000	Material Services	
Phone Number:					
Accounting:	Document Level				
Ship to:	Foothill-De Anza CCD				
	District Receiving, Bldg D170				
	12345 El Monte Rd				
	Los Altos Hills, CA 94022				
Attention:	District Shipping & Receiving				
Contact:	District Shipping & Receiving				
Phone Number:					
Vendor:					
Phone Number:					



Banner Document Management Results Page

ID	TYPE	DOCUMENT TYPE	Document ID	Link
R0008736	REQUISITION	CONTRACTS/AGREEMENTS/LEASES	1297	Display Document
R0008736	REQUISITION	SIGNED PO	1301	Display Document
R0008736	REQUISITION	CHANGE ORDER DOCS	1300	Display Document
R0008736	REQUISITION	QUOTE-BID/RFP/RFQ/SPECS	1279	Display Document

Form **W-8BEN**
(Rev. February 2006)
Department of the Treasury
Internal Revenue Service

**Certificate of Foreign Status of Beneficial Owner
for United States Tax Withholding**

OMB No. 1545-1621

▶ Section references are to the Internal Revenue Code. ▶ See separate instructions.
▶ Give this form to the withholding agent or payer. Do not send to the IRS.

Do not use this form for:

- A U.S. citizen or other U.S. person, including a resident alien individual W-9
- A person claiming that income is effectively connected with the conduct of a trade or business in the United States W-8ECI
- A foreign partnership, a foreign simple trust, or a foreign grantor trust (see instructions for exceptions) W-8ECI or W-8IMY
- A foreign government, international organization, foreign central bank of issue, foreign tax-exempt organization, foreign private foundation, or government of a U.S. possession that received effectively connected income or that is claiming the applicability of section(s) 115(2), 501(c), 892, 895, or 1443(b) (see instructions) W-8ECI or W-8EXP

Note: These entities should use Form W-8BEN if they are claiming treaty benefits or are providing the form only to claim they are a foreign person exempt from backup withholding.

- A person acting as an intermediary W-8IMY

Note: See instructions for additional exceptions.

Part I Identification of Beneficial Owner (See instructions.)

1 Name of individual or organization that is the beneficial owner	2 Country of incorporation or organization
3 Type of beneficial owner:	
<input type="checkbox"/> Individual <input type="checkbox"/> Corporation <input type="checkbox"/> Disregarded entity <input type="checkbox"/> Partnership <input type="checkbox"/> Simple trust <input type="checkbox"/> Grantor trust <input type="checkbox"/> Complex trust <input type="checkbox"/> Estate <input type="checkbox"/> Government <input type="checkbox"/> International organization <input type="checkbox"/> Central bank of issue <input type="checkbox"/> Tax-exempt organization <input type="checkbox"/> Private foundation	
4 Permanent residence address (street, apt. or suite no., or rural route). Do not use a P.O. box or in-care-of address.	
City or town, state or province. Include postal code where appropriate.	Country (do not abbreviate)
5 Mailing address (if different from above)	
City or town, state or province. Include postal code where appropriate.	Country (do not abbreviate)
6 U.S. taxpayer identification number, if required (see instructions)	7 Foreign tax identifying number, if any (optional)
<input type="checkbox"/> SSN or ITIN <input type="checkbox"/> EIN	
8 Reference number(s) (see instructions)	

Part II Claim of Tax Treaty Benefits (if applicable)

9 I certify that (check all that apply):

a The beneficial owner is a resident of _____ within the meaning of the income tax treaty between the United States and that country.

b If required, the U.S. taxpayer identification number is stated on line 6 (see instructions).

c The beneficial owner is not an individual, derives the item (or items) of income for which the treaty benefits are claimed, and, if applicable, meets the requirements of the treaty provision dealing with limitation on benefits (see instructions).

d The beneficial owner is not an individual, is claiming treaty benefits for dividends received from a foreign corporation or interest from a U.S. trade or business of a foreign corporation, and meets qualified resident status (see instructions).

e The beneficial owner is related to the person obligated to pay the income within the meaning of section 267(b) or 707(b), and will file Form 8833 if the amount subject to withholding received during a calendar year exceeds, in the aggregate, \$500,000.

10 Special rates and conditions (if applicable—see instructions): The beneficial owner is claiming the provisions of Article _____ of the treaty identified on line 9a above to claim a _____ % rate of withholding on (specify type of income): _____
 Explain the reasons the beneficial owner meets the terms of the treaty article: _____

Part III Notional Principal Contracts

11 I have provided or will provide a statement that identifies those notional principal contracts from which the income is **not** effectively connected with the conduct of a trade or business in the United States. I agree to update this statement as required.

Part IV Certification

Under penalties of perjury, I declare that I have examined the information on this form and to the best of my knowledge and belief it is true, correct, and complete. I further certify under penalties of perjury that:

- 1 I am the beneficial owner (or am authorized to sign for the beneficial owner) of all the income to which this form relates,
 - 2 The beneficial owner is not a U.S. person,
 - 3 The income to which this form relates is (a) not effectively connected with the conduct of a trade or business in the United States, (b) effectively connected but is not subject to tax under an income tax treaty, or (c) the partner's share of a partnership's effectively connected income, **and**
 - 4 For broker transactions or barter exchanges, the beneficial owner is an exempt foreign person as defined in the instructions.
- Furthermore, I authorize this form to be provided to any withholding agent that has control, receipt, or custody of the income of which I am the beneficial owner or any withholding agent that can disburse or make payments of the income of which I am the beneficial owner.



B-F-ID

Banner Document Type:

- W9s
- W8s
- Vendor information forms





FOOTHILL-DE ANZA Community College District

My Account
Content Layout

Welcome Pamela!
You are currently logged in.

Groups Logout Help

- Home
- Employees
- Students
- Registration
- Banner**
- Reports

April 24, 2014

Approval Alerts

Requisition:	1
Total:	1

Next Approver All Documents

Banner Training

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For user instructions click [HERE](#).

- Banner Fundamentals
- Finance
- Financial Aid
- Human Resources
- Student

Open Classes Finder

Quickly locate open and newly added classes.

Term & College: 2014 Spring Foothill
2014 Spring De Anza
2014 Summer Foothill

[Browse Course Listings](#)

Banner Applications

- Internet Native Banner**
Open a PROD INB session in a new window
- Banner Self-Service**
Open the web services main menu
- Banner Reports**
View, search, and print output from Banner jobs and processes
- Banner Document Management Suite**
View and search archives of scanned documents
- Faculty Leave and Sub Pay**
Advanced workflow for faculty leave reporting
- Active Roster Administration**
Advanced faculty rosters

DegreeWorks

[Launch DegreeWorks](#)

Banner Resources

[iFOAP Search](#)

[Chart of Accounts Crosswalk - FRS to Banner](#)

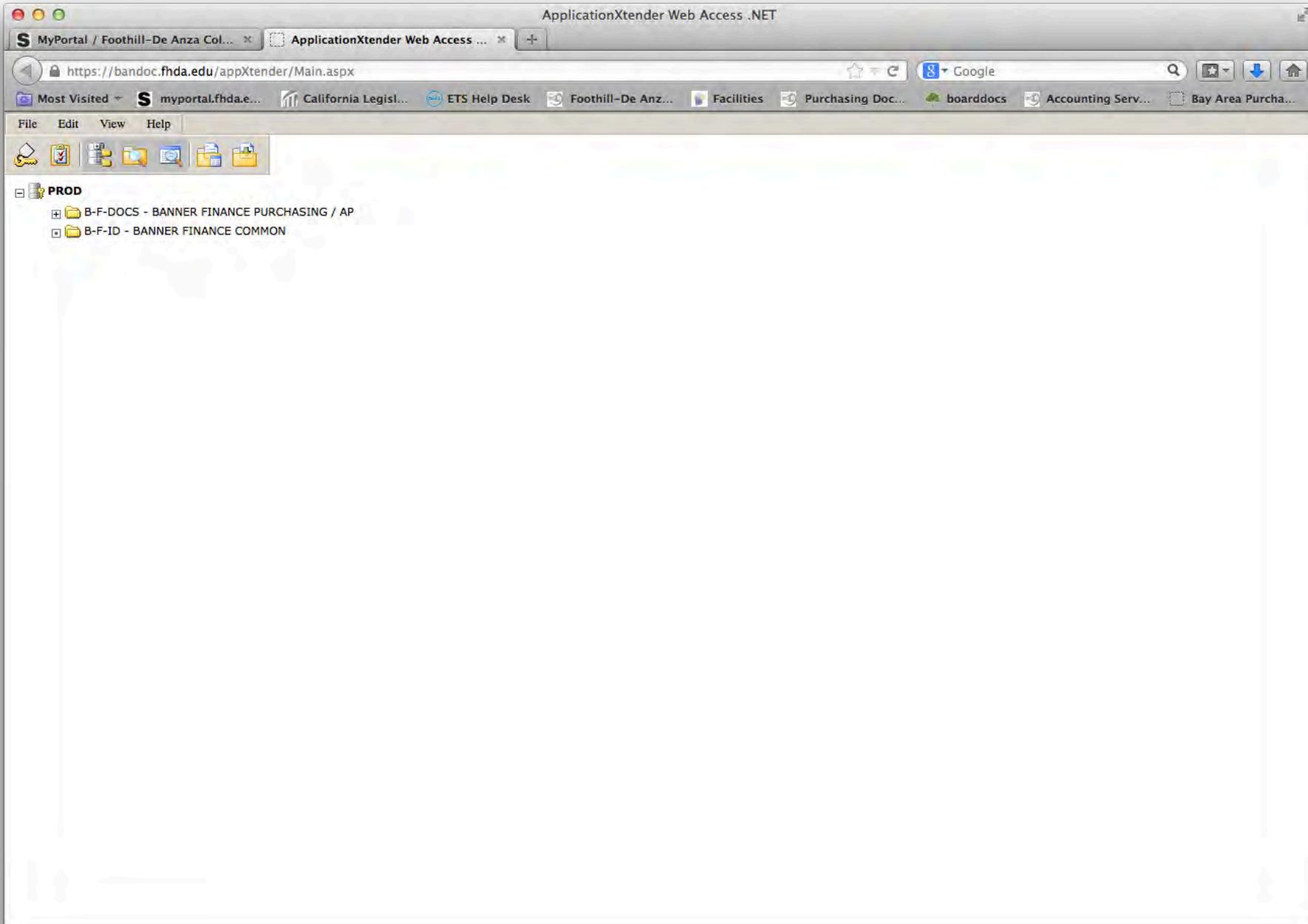
Finance Services

- [Create a Requisition](#)
- [Check Available Balance](#)

Course Monitoring

- [Look up Classes](#)
Get a department overview of courses





B-F-ID

- File cabinet where W9s, W8s and vendor information forms will be stored
- Limited to authorized users only
- Only the last 5 digits of a SSN will show when queried
- Taxonomy taken from document names



BDM is able to retrieve indexed documents using the Query feature. Right click on either folder and you will see the following screen. There are drop-down menus to select your Banner Doc Type and/or Document Type.

The screenshot shows a web-based query interface. At the top, there is a menu bar with 'File', 'Edit', 'View', and 'Help'. Below the menu bar is a toolbar with various icons. The main title is 'Query Criteria for Application 'B-F-DOCS'' and the current query is 'New Query'. The interface is divided into several sections:

Show	Index Name	Search Value
<input checked="" type="checkbox"/>	DOCUMENT ID	<input type="text"/>
<input checked="" type="checkbox"/>	BANNER DOC TYPE	<input type="text" value="*"/>
<input checked="" type="checkbox"/>	DOCUMENT TYPE	<input type="text" value="*"/>
<input checked="" type="checkbox"/>	TRANSACTION DATE	<input type="text"/>
<input checked="" type="checkbox"/>	VENDOR ID	<input type="text"/>
<input checked="" type="checkbox"/>	VENDOR NAME	<input type="text"/>
<input checked="" type="checkbox"/>	FIRST NAME	<input type="text"/>
<input checked="" type="checkbox"/>	PIDM	<input type="text"/>
<input checked="" type="checkbox"/>	ROUTING STATUS	<input type="text" value="*"/>
<input checked="" type="checkbox"/>	ACTIVITY DATE	<input type="text"/>

Below the table is the 'Query Options' section, which includes a 'Show' dropdown menu set to 'all documents', a checkbox for 'Include previous document revisions', and a 'Save Options' section with a 'Query Name' field and a checkbox for 'Available to All Users'. At the bottom right, there are 'Submit', 'Save', and 'Reset' buttons.

The * is the wild card in BDM.
To use the Query feature select a Document Type in the drop down list. Then just click "Submit".

All of the listed Index field Names are searchable

In this example I used “Check” as my query:

Query Results for Application 'B-F-DOCS'

Document 1 - 23 of 23

<input type="checkbox"/>	DOCUMENT ID	BANNER/DOK TYPE	DOCUMENT TYPE	TRANSACTION DATE	VENDOR ID	VENDOR NAME	FIRST NAME	PIDM	ROUTING STATUS	ACTIVITY DATE	Document ID	Pages
<input type="checkbox"/>	25061088	CHECK	CHECK	19-Feb-2014				1803405		2014-02-19 15:12:42	108	1
<input type="checkbox"/>	25061101	CHECK	CHECK	19-Feb-2014				274662		2014-02-19 15:13:56	110	1
<input type="checkbox"/>	25061357	CHECK	CHECK	28-Feb-2014				1068052		2014-02-28 11:14:14	270	1
<input type="checkbox"/>	25061387	CHECK	CHECK	28-Feb-2014				1866375		2014-02-28 10:40:52	265	1
<input type="checkbox"/>	76004929	CHECK	CHECK	19-Feb-2014				1864989		2014-02-19 15:11:10	106	1
<input type="checkbox"/>	76004930	CHECK	CHECK	20-Feb-2014				274237		2014-02-20 13:11:29	142	1
<input type="checkbox"/>	76004931	CHECK	CHECK	20-Feb-2014				1865457		2014-02-20 13:12:19	143	1

Below is a query for “W9’s” in the B-F-ID folder:

Query Results for Application 'B-F-ID'

Document 1 - 4 of 4

<input type="checkbox"/>	ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE	FISCAL YEAR	CHART OF ACCOUNT	ROUTING STATUS	ACTIVITY DATE	Document ID	Pages
<input type="checkbox"/>	1866720		W-9								2014-02-19 11:54:19	21	1
<input type="checkbox"/>	278492		W-9								2014-02-19 11:51:34	19	1
<input type="checkbox"/>	1866376		W-9								2014-02-19 11:48:32	17	1
<input type="checkbox"/>			W-9								2014-02-19 11:30:27	10	1

As you can see, quite a bit of information is available from the query.

To select a document, double click the document icon and document will display.



Viewing Documents in INB

Once documents have been indexed, you will be able to pull them up and view them from the INB.

For example we use FOIDOCH for most of our searches. In this example I have entered an invoice number “10089348”. If you are not already logged into my Portal it will take you to the web page to log on.

Click on the Magnifier Glass. All documents indexed to the highlighted Banner Doc Type will be listed on the next screen.



Document History FOIDoch 8.5 (PROD)

Document Type: INV Invoice Document Code: 10089348

Document Type	Status
Requisition	
Bid	
Purchase Order	
Issues	
Invoice	P
Check	25061088
Return	
Receiver	
Asset Tag	
Asset Adjustment	

1. You can now double click on the document to view it.

Query Results for Application 'B-F-DOCS'

Document 1 - 1 of 1

DOCUMENT ID	BANNER DOC TYPE	DOCUMENT TYPE	TRANSACTION DATE	VENDOR ID	VENDOR NAME	DEPT NAME	FORM	ROUTING STATUS	ACTIVITY DATE	Document ID	Pages
10089348	INVOICE	VENDOR INVOICE	18-Feb-2014						2014-02-18 12:18:31	51	1





INVOICE

INVOICE #119
 PO #HH134248
 DATE: FEBRUARY 16, 2014

TO: Foothill-De Anza CCD

12345 El Monte Road
 Los Altos Hills, CA 94022
 Attention: Chien Shih, ETS

FOR:

Provide service as a Banner Consultant for the ETS
 Systems and Operations
 Jan 2014 - Feb 2014

DESCRIPTION	SERVICE HOURS	RATRE IN HOURS	AMOUNT
Worked as a consultant to support FHDA Banner Student Team, including:		\$100	
Course description function mod to allow clob data display in Portal	1		\$100
Assist Jerrick with query building with TBVCSR	1		\$100
Help Jim with building logic for a district Student AR report	1		\$100
Assist with reviewing and reapplying a mod to a document imaging package efkimag as a work around to continuing using CWID for fund/org security check	0.5		\$50
Periodic task review and planning	2		\$200
Enhancements to Registration Priority process to allow IR users access utilizing Baner baseline security	4		\$400
Investigate how to allow instructors to be able to submit grades even after a grade roll and apply code mods	3.5		\$350
Work with Jerrick to review Registration Priority and Student Success Checklist to address some of the discrepancies	1		\$100
Work with Jerrick to review, revise and integrate into FHDA environment a peer package that auto rolls waitlisted students into enrollment, also seek to replace individual procedures in this package with Banner registration API so as to ensure future compatibility	11		\$1,100
Investigate a discrepancy reported by Rachel regarding the auto refund process that has been automated	4		\$400
Emails, conference calls, miscellaneous support, project management for the month	2		\$200
Total	31		\$3,100

Please make all checks payable to **Xiaobin Li**



File Edit View Options Help

Query Results for Application 'B-F-DCS' [Modify Query](#)

Document 1 - 1 of 1

DOCUMENT ID	BANNER DOC TYPE	DOCUMENT TYPE	TRANSACTION DATE	VENDOR ID	VENDOR NAME	FIRST NAME	PIRN	EDITING STATUS	ACTIVITY DATE	Document ID	Pages
	CHECK	CHECK	19-Feb-2014				1803405		2014-02-19 15:12:42	108	1

File Document Page Help

Page 1 Zoom 100%

Foothill-De Anza College District - Accounts Payable

VENDOR INVOICE NUMBER	DATE	PO NUMBER	BANNER INV NUMBER	BANNER USER ID	INVOICE AMOUNT	DISCOUNT AMOUNT	AMOUNT PAID
119	02/19/14		1008934a		3,100.00	.00	3,100.00 USD

WARRANT NUMBER	WARRANT DATE	BANNER VENDOR ID	TOTAL TAX	TOTAL ADJL CHARGES	WARRANT AMOUNT
2564708	02/19/14	29128857	3,100.00	.00	3,100.00

REMARKS:

COUNTY OF SANTA CLARA WARRANT
 Foothill-De Anza Community College District
 13345 EL MONTE ROAD
 LOS ALTO HILLS, CALIFORNIA 94022-4599

WARRANT DATE: 02/19/14
 WARRANT NUMBER: 25051088
 WARRANT AMOUNT: \$*****3,100.00 USD

PAY:***Three Thousand One Hundred & 00/100*****

APPROVED BY THE GOVERNING BOARD

FILED BY: C25061088C A071923284A 876 541 6703C

Security

- Staff will be able to single sign on through MyPortal
- The security model deployed is based on the Banner role based security
- We currently have three access classes
 - read only, read/write, read/write/delete
- The provision is controlled from Banner, and is real time.
- The cabinet security class can be further defined to the document type level, but this is not advisable, given the resources within each department and the complexity we need to maintain within the document depository, if needed, we need to re-visit the security model in more detail



Next Steps

- Steering Committee sign off
- Next identified user – FF&E Coordinator
- Develop timeline and roll-out plan
- Equipment needs
 - create a standard list of equipment based on needs and role
- Documentation and training
 - Train the trainer vs. Purchasing/ETS training
 - Develop training schedule and documentation

