Project Team Kickoff

April 17, 2003

Agenda

- Greetings
- Project Environment
- Project Timelines
- Project Organization
- Team Matrix
- Tools
- Questions and Answers, and General Discussion

Project Management

- The project Coordinating Committee consists of the
- The processing EXPERTS who make it all happen!!!

Project Charter

- Project Goals and Vision
- Project Values and Methods
- Opportunities
- Critical Success Factors and Definition of Success
- Benefits of Project Involvement
Project Goals and Vision

- Accomplish the State-mandated transition off the SAMAS/FLAIR financial system and the payroll processing services of the Bureau of State Payrolls (BOSP).
  - Meet the mandated deadline of July 1, 2004 for financial processing.
  - Meet the mandated deadline of January 1, 2005 for payroll processing.

Project goals - continued

- In addition to replacing State systems, replace selected UWF systems:
  - Replace payroll/personnel/budget (PPB) system with Banner Human Resources.
  - Replace property system with fixed assets function of Banner Finance.
  - Replace “FirstMate” employee web portal with the employee self-service functions of Banner Human Resources.

Other project goals

- Provide a solution for grants and contracts processing using Banner Finance.
- Successfully integrate Banner to other UWF administrative information systems.
- Implement Banner without customized programming changes; that is, “plain vanilla” is a great flavor!!!
- Pursue common solutions with other SUS universities that use Banner Finance and HR.

Priorities

- 1st – Implement required functionality to maintain business operations, by the required deadlines.
- 2nd – Implement enhancements and business transformations to improve business processes, services, and management information at UWF.
Project Values and Methods

- Commitment.
- Collaboration, cooperation, and teamwork.
- Willingness to innovate and adapt.
- Communication.
- Professionalism.
- Shared responsibility and mutual support.
- Courage.

Opportunities

<table>
<thead>
<tr>
<th>UWF IT Strategic Goal</th>
<th>Opportunity to advance this goal with Banner.</th>
</tr>
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<tbody>
<tr>
<td>Implement Banner electronic workflow to convert paper-based processes to electronic workflows.</td>
<td>Implement employee self-service functions of Banner to replace paper-based processing with web-based processing.</td>
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<tr>
<td>Use desktop tool interface features of Banner, such as Excel integration in budgeting.</td>
<td>Provide a more seamless and integrated administrative systems environment.</td>
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<tr>
<td>&lt;continued&gt;</td>
<td>Opportunity to advance this goal with Banner.</td>
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- Utilize integration between Banner modules.
- Interface other UWF administrative information systems to Banner.
- Use Luminis web portal to provide an integrated web environment, not only for Banner systems, but also for other web-based UWF systems.
Opportunities

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<td>Provide more flexible and seamless access to administrative information.</td>
<td>Use the Reporting datamarts feature of Banner to provide flexible ad hoc reporting and information query solutions to meet management needs.</td>
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Critical Success Factors and Definition of Success

- Meeting the mandated deadlines.
- Meeting mandated State requirements.
- Maintaining University operations without serious disruption.
- Excellent communications with the rest of the University.
- Successful implementation of change and improvement.

What’s in it for me???

- We get to keep our jobs!!
- Financial rewards and incentives.
- Improved work environment and processes.
- Professional development, and acquiring valuable skills.
- Improved service to clients, and improved customer satisfaction.

Project Environment
Unconscious Competence

Conscious Competence

Conscious Incompetence

Unconscious Incompetence

New Rules

Practice Reinforcement

Awareness

Training

Terms of Participation

Project Timelines

Banner Finance
Team Leader: Doyle Pitts
Human Resource Teams

Benefits
- Retirement & Longevity
- Health Care
- Travel
- Disability
- Life Insurance
- Accident
- Legal
- Dental
- Voluntary
- Other

Employment & Classification
- Position Control
- Payroll

Coordinator
- Jeff Comeau
- Laurie Jones
- Valerie Moneyham
- William Pollard

Suz-Ann Olafson

Team Matrix

Tools
- Banner Project Web Site
- Calendars
- Project Definition Document
- Project common directory
- Configuration Management Plan
- Issue/Jeopardy/Change Request Management
- Meeting Agenda & Minutes
- Status Reporting

“BUT … We’ve always done it this way”

“The American landscape is littered with the remains of technically [and fiscally] sound programs that have been crushed by employees’ resistance to change.” T. Terez