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Western Oregon UNIVERSITY

# WOU STRATEGIC BUDGET PROPOSAL FOR INSTITUTIONAL PRIORITIES

## I. PROPOSAL OVERVIEW

| | | |
|---|---|---|
| Title<br>Banner Trainer | | |
| Department<br>Business Services | Requestor<br>Darin Silbernagel | |
| Requestor Email<br>silbernd@wou.edu | Requestor Phone<br>503-838-8176 | Request Date<br>11/21/17 |

## II. TIMEFRAME

| | | |
|---|---|---|
| **Proposed Dates** | Start 01/01/18 | End |

## III. PROPOSAL SUMMARY

*Make your summary **concise** and compelling. Avoid jargon and acronyms. A limit of 100 words is recommended.*

To put back in place a Banner Trainer (lost a number of years back to budget reductions). This is critically important with the upgrade and implementation of Banner 9 between now and December 31, 2018. Banner 9 will require retraining of all Banner users. As time permits this person will be used to cross train for accounting functions and to cover when needed.

## IV. PROPOSAL SCOPE

Describe the proposal and the expected outcomes if approved. Additional space available on the next page.

The proposal if implemented will put in place needed Banner training, especially critical for implementation of Banner 9 between now and December 31, 2018. All Banner users will need training for this implementation.

This position will help test functionality, write up and update procedures for use with Banner 9. This person will then use them to train Banner users campus wide. Hands on training will be completed in both in group and individual sessions depending on the topic. This training will cross all functional areas of the campus, FIS/HRIS/SIS and Banner Self Serve (WOLF Web).

See attached position description.

***Proposal Scope continued***

## V. STRATEGIC ALIGNMENT

Describe the proposal's linkage to the university Strategic Plan.

Because Banner crosses many aspects of our campus environment (Student, Finance Human Resources and Self Serve) it will touch upon support of faculty, staff and students in various ways. This includes tings like:

I. Student Success,
4. Streamline and improve university processes in support of student achievement

IV. Accountability,
2. Operate in manner that supports the university's values and continuous improvement

V. Sustainability & Stewardship
1. Enhance financial sustainability through enrollment and fiscal strategies
2. Maintain access and affordability with regard to cost of degree attainment
3. Diversify and expand revenue sources
3.1 Cultivate sustainable financial resources to achieve goals of the strategic plan
5. Provide effective technology solutions that support campus programs in alignment with the mission and goals of the university

## VI. ADDITIONAL INFORMATION

Please include the following: implementation plan, assessment plan and the plan to sunset proposal if assessed objectives are not met in the timeframe outlined.

To be as effective and successful as possible, recruitment should start soon to maximize the potential success. We must be successful on Banner 9 by December 31, 2018 when Banner 8 support sunsets. Just getting over on Banner 9 does not make us completely successful unless all users are trained and comfortable with the proper to use of the system. Failure is not an option.

| **VII. BUDGET** Select all sources that will fund this proposal and complete form A (below) for each source. (Additional copies on pages 6-8.) | | | |
|---|---|---|---|
| Education & General ☑ | Grant ☐ | Self-Support Academic ☐ | Self-Support Non-Academic ☐ |

| **A. Funding Source** | Education & General ☑ | | Grant ☐ | Self-Support Academic ☐ | | Self-Support Non-Academic ☐ |
|---|---|---|---|---|---|---|
| | **One-Time Funding** | | | **Base (3-yr Recurring) Funding** | | |
| **INFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **SFTE** | | | | | | |
| **Revenue** | | | | | | |
| **OUTFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **FTE** | | | | | | |
| **Salaries** | | | | | | |
| **Benefits** | | | | | | |
| **Materials & Supplies** | | | | | | |
| **Travel** | | | | | | |
| **Contracted Services** | | | | | | |
| **Capital** | | | | | | |
| **Other Operations** | | | | | | |
| **TOTAL** | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

| **A. Funding Source** | Education & General ☐ | Grant ☐ | | Self-Support Academic ☐ | Self-Support Non-Academic ☐ | |
|---|---|---|---|---|---|---|
| | **One-Time Funding** | | | **Base (3-yr Recurring) Funding** | | |
| **INFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **SFTE** | | | | | | |
| **Revenue** | | | | | | |
| **OUTFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **FTE** | | | | | | |
| **Salaries** | | | | | | |
| **Benefits** | | | | | | |
| **Materials & Supplies** | | | | | | |
| **Travel** | | | | | | |
| **Contracted Services** | | | | | | |
| **Capital** | | | | | | |
| **Other Operations** | | | | | | |
| **TOTAL** | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

| **A. Funding Source** | Education & General ☐ | Grant ☐ | | Self-Support Academic ☐ | Self-Support Non-Academic ☐ | |
|---|---|---|---|---|---|---|
| | **One-Time Funding** | | | **Base (3-yr Recurring) Funding** | | |
| **INFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **SFTE** | | | | | | |
| **Revenue** | | | | | | |
| **OUTFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **FTE** | | | | | | |
| **Salaries** | | | | | | |
| **Benefits** | | | | | | |
| **Materials & Supplies** | | | | | | |
| **Travel** | | | | | | |
| **Contracted Services** | | | | | | |
| **Capital** | | | | | | |
| **Other Operations** | | | | | | |
| **TOTAL** | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

| **A. Funding Source** | Education & General ☐ | Grant ☐ | | Self-Support Academic ☐ | Self-Support Non-Academic ☐ | |
|---|---|---|---|---|---|---|
| | **One-Time Funding** | | | **Base (3-yr Recurring) Funding** | | |
| **INFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **SFTE** | | | | | | |
| **Revenue** | | | | | | |
| **OUTFLOWS** | FY17 | FY18 | FY19 | FY17 | FY18 | FY19 |
| **FTE** | | | | | | |
| **Salaries** | | | | | | |
| **Benefits** | | | | | | |
| **Materials & Supplies** | | | | | | |
| **Travel** | | | | | | |
| **Contracted Services** | | | | | | |
| **Capital** | | | | | | |
| **Other Operations** | | | | | | |
| **TOTAL** | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

| VIII. PROPOSAL SIGNATURES | | |
|---|---|---|
| Department Head | Name Darin E. Silbernagel | Signature |
| Division Head | Name | Signature |
| Vice President | Name Eric Yahnke | Signature |

| IX. ACTION | | |
|---|---|---|
| **Recommended by UBC** | Yes ☐ No ☐ | Date |
| Comments: | | |
| **Recommended by President** | Yes ☐ No ☐ | Date |
| Comments: | | |
| **Final Approval** | Yes ☐ No ☐ | Date |
| Comments: | | |

# Classified Position Description

☐ New ☐ Revised

## Section 1: Position Information

Class Title:

Class Number:

Position Number:

Working Title: Banner Trainer

Work Unit: Business Services

Work Location (City-County): Monmouth - Polk

Employee Name: Vacant

Effective Date: 1/1/2018

Position:

| | | | |
|---|---|---|---|
| [X] Regular | [ ] Seasonal | [ ] Limited Duration | [ ] Academic Year |
| [X] Full-Time | [ ] Part-Time | [ ] Intermittent | [ ] Job Share |

FSLA: ☐ Exempt – Not eligible for overtime ☐ Non-Exempt – Eligible for Overtime

## Section 2: Program/Position Information

Describe the program in which this job exists. Include program purpose, who's effected, size, and scope. Include relationship to agency mission.

This position is located in the Western Oregon University Business Office. The Business Office is responsible for the processing and reporting for all financial transactions for the institution. The operation of the Office directly affects each of the institution's employees, students, and suppliers, student sponsors, some employees of other state agencies, and some members of the public. The Office's operations are vital to the independent operation of the institution. The Office has sixteen employees, excluding students and temporary hires.

Describe the purpose of this position, and how it functions within this program, by completing this statement:
**The purpose of this job/position is to . . .**

This position is responsible for the training of the Banner Information System (Student, Finance, Human Resource Accounts receivable and Banner Self-Serve, WOLF Web. This position duties includes the following: 1) assist in troubleshooting and testing for Banner upgrades, 2) preparing and assisting to keep up the chart of accounts and rule codes, 3) proposing institutional policy, 4) maintaining user manuals for SIS, FIS, HRIS, and Banner Self-Serve and 5) is a contact person for SIS, FIS and HRIS related issues campus-wide. This position is also responsible for the initial as well as on-going training of the Western employees on the use of the Banner products. Assists with Banner upgrades.

## Section 3: Description of Duties

List major duties. Note the percentage of time that the duties are performed. If this is an existing position, mark "N" for new duties or "R" for revised duties. To comply with the American Disability Act, identify the duty as "essential function" by marking the duty with EF.

| % of Time | N/R | DUTIES |
|---|---|---|
| 90% | | Banner Training across all systems in support of new users and on-going system upgrades and changes.<br>• Work directly with users in identifying Banner system functional problems, needs and solutions.<br>• Identify, research, document and implement custom enhancements and modifications to improve utilization of Banner Student, Finance, Human Resources and Accounts Receivable Modules.<br>• Utilizes Cognos against the data warehouses for some reporting as needed.<br>• Work with the Banner Project Coordinator, SIS Functional Support, and Banner Programmers in implementation of new functionality and upgrades to the Banner systems.<br>• Work with Banner Project Coordinator on Banner upgrades including Banner 9 over the next year.<br>• Write up and maintain procedures related to Banner functions.<br>• Responsible for creating and maintaining a Banner user training manuals.<br>• Work with Banner users to solve problems and roll out additional functionality.<br>• Cross train with the rest of the Banner Team to support as needed during staff absences.<br>• Process Bond reimbursement requests as needed.<br>• Accounting Special Projects as needed, including backup and cross training. |
| 10% | | SPECIAL PROJECTS AND OTHER DUTIES AS ASSIGNED. |

## Section 4: Working Conditions

Describe special working conditions, if any, that are a regular part of this job. Include frequency of exposure to these conditions.

This position will have occasional contact with irate, argumentative, or hostile staff regarding Office rules, policies, and/or billing. This position works with departmental staff out in the departments on campus on Banner functionality. Typical office environment. Knowledge and use of personal computer, copier and ten key calculator is required on a regular basis.

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## Section 5: Guidelines

List any established guidelines used to do this job, such as state or federal laws or regulations, policies, manuals or desk procedures.

WOU Policies and Procedures
State and Federal Statutes and Administrative Rules
SIS, FIS and HRIS Rule Codes
Oregon State Accounting Manual

How are these guidelines used to perform the job?

Regulations are researched and referenced frequently for assistance in establishing policies and determining correct procedures which are in compliance with federal, state and institutional policies.

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## Section 6: Work Contacts

With whom, outside of co-workers in this work unit, must this position regularly come in contact?

| Who Contacted | How | Purpose | How Often? |
|---|---|---|---|
| Departmental Staff | Person/Phone | Normal Business Activity | Daily |

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## Section 7: Job Related Decision Making

Describe the kinds of decisions likely to be made by this position. Indicate effect of these decisions where possible.

This position will make decisions on the training and coordination of individuals related to the Banner systems. The employee will recommend to the Director of Business Services changes to office and campus policy, procedures, and practices as needed.

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## Section 8: Review of Work

Who reviews the work of this position? (List classification title and position number.) How? How often? Purpose of the review?

This position is reviewed by exception, and annually by the Director of Business Services for conformance to acceptable accounting, FIS SIS and HRIS standards. Specific reviews will be done of major projects and activities.

## Section 9: Leadwork or Coordination of Duties

Which of the following leadwork/coordination activities does this job perform?

☐ Trains Employees ☐ Directs Work Procedures ☐ Provides Informal Work Review to Supervisor
☐ Assigns Work ☐ Reviews Work

What percentage of time does this position perform these duties? 0 % For how many employees? 0

## Section 10: Additional Job-Related Information

Any other comments that would add to an understanding of this position:

This position works with departmental staff out in the departments on campus and as part of the FIS/HRIS/SIS Project/Core Team.

This position may be asked to fill in for, or represent the Director of Business Services, Budget Director and/or Human Resources Director at meetings, projects, or presentations as requested.

SPECIAL REQUIREMENTS: List any special mandatory recruiting requirements for this position:

Extensive knowledge of generally accepted accounting principles and manual and computerized accounting systems.
General knowledge of internal controls.
Skill in reconciling contradictory and/or incomplete records.
Skill in writing clear and concise reports.
Skill in training individuals on Banner process and procedures.
Skill in putting together training manuals.

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate in what area, how much (biennially) and type of funds:

## Section 11: Organizational Chart

Complete the chart below:

| | | |
|---|---|---|
| Reviewer<br>Name & Title | Darin Silbernagel<br>Director of Business Serv. | |
| Supervisor<br>Name & Title | Michele VanDeusen<br>Banner Project Manager | Names & titles of those for whom **this employee** provides leadwork |
| Employee<br>Name & Title<br><br>Name and Title of other employees reporting to the same supervisor | Vacant<br>Banner Trainer | |

| | | |
|---|---|---|
| Michele VanDeusen<br>Supervisor - Print Name Here | Supervisor – Sign Here | Date |
| Darin E. Silbernagel<br>Reviewer – Print Name Here | Reviewer – Sign Here | Date |
| Employee - Print Name Here | Employee – Sign Here | Date |
| Judy Vanderburg<br>Appointing Authority – Print Name Here | Appointing Authority – Sign Here | Date |