

# **Strategic Reporting from Gonzaga's Banner System**

## **Strategic Reporting from Banner**

The purpose of this document is to show how Information Heavylifting may supplement the Gonzaga University Banner Enterprise Database, especially in the area of historical research including cradle to grave tracking of student's university experience. If an enterprise database does not have strategic capability, TeamsWin Information Heavylifting can help.

## **User View**

Users do not need to know the difference between a strategic and a functional enterprise database. In fact, to the user a strategic view would look like just another function in the system.

Using the same portal they currently use, users could be able to see multimedia information organized by any strategic entity or by any relationship between strategic entities.

Can you imagine filtering down to a location and seeing the Gonzaga people associated with that location through the years in multi media with appropriate time period styles and colors? You could expand the filter to see the whole world or shrink the filter down to a location like Bonners Ferry, Idaho and see all the influence Gonzaga has had on that location. Or you could see the impact Government has had on the university over the years. Or a professor could see where all his students, where they went and what they did. Or a prospective student can see an example of the impact the university has on the world, and how no matter where he goes he will have a chance to find fellow Zags.

History revision reports can be created to add styles and color and whatever to any time period. As long as those styles and colors are reported, with Information Heavylifting you can have all this capability for the cost of one clerical position.

## **Functional Enterprise Database**

Many enterprise databases are functional, but not yet strategic. For example, functional enterprise databases have integrated functions where current information about an object is stored and defined in one place. This is the major step in supporting day-to-day business operations. To support the functions, they also have history of transactions and changes to the data. They may even have their information summarized and stored by time period. But, they do not have the key translating that information into strategic relationships.

## **Strategic Enterprise Database**

A strategic enterprise database is used and required for Cradle-to-grave tracking of student's university experience, including the continuum from first interest in Gonzaga to legacy giving and other opportunities for historical research.

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A strategic enterprise database is built from reports. These reports are the same reports decision makers are already using from internal and external business functions. A strategic database is organized by the strategic roles of business objects. In other words, a strategic enterprise database is organized by people, places, things and events over time.

## Reports

Businesses produce reports from each function. Each function (Students, Finance, Alumni, Government and Employees) creates a little information about each strategic entity (like people, places, things and events). Using information in those reports, our TeamsWin Information Heavylifting transforms functional information into strategic relationships, the relationships used for business decision making and those required to track cradle to grave.

Reports (and only reports) organize things by time period. Because time period is one of the strategic entities, a strategic database has to be built from reports. For example, to be able to track the student's university experience cradle-to-grave, things need to be organized by time period in reports that do not change. Even the revisions to history must come from reports that do not change.

Also, reports reflect the way things were organized during that time period. Just having a date stamp on a piece of data (or even on a report design) is not enough to properly represent who was responsible for what back when. In other words, reports reflect the current business model. They represent the design of your benchmarking system, or how you are going to measure success.

History comes from reports. Not many enterprise databases can prove themselves reliable by referencing unchanging historical reports. If the purpose of history is confidence in the decision making process, that confidence must be measured. See our document on History of Cause and Effect for more detail on measuring that confidence. Plus, see Monarch (a report reading/parsing program from Datawatch) advertising for more information as to why systems that do not reference and tie back to actual historical reports have problems.

## TeamsWin Information Heavylifting Proposal

Our experience allows us to produce fixed price estimates of our services. The following fixed prices are from the worksheets in the Proposals page of [www.teamswin.net](http://www.teamswin.net).

Based on our experience we can get your Gonzaga information into strategic order for \$25,250 the first year and \$18,450 every other year. Not only that, but we can do it in a very short time, almost as fast as you can get us access to the reports.

To begin we need only five reports, one from each of your five functions. Then there would be another five annual reports for things like industry standards and charts of

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accounts. Assuming you have a bi-weekly payroll, the cost of your payroll reports would double for an additional \$1,800 per year. Once you get going you will probably want to expand to other reports outside the scope of your current requirements. So in the end I would estimate needing three reports from each function or 15 reports set up and 15 reports each month. So, the scope would be 65 to 185 reports downloaded per year (5 to 15 per month) at \$90 each plus \$450 for each of the 10 to 15 setups. Your setup cost would be \$4,500 (\$2,250 later if required) and continuing monthly cost would be \$540 to \$1,620 per month or \$5,850 to \$16,650 per year and with setup \$23,450 the first year. With a bi-weekly payroll it would total an extra \$1,800 or \$18,450 per year and \$25,250.

That is the cost of getting your information into strategic order, less than the cost of one clerk. The reason the cost is low is that it does not take us very long to do the work.

If your system can produce old reports for previous years, they would also be the same cost \$5,850 to \$16,650 per year.

If you want output from us (from your new strategic database), our rates are also very reasonable. For example: \$240 for a worksheet/query, or \$207 for any kind of information or question regarding the process. Over the years we estimate those questions take us from 20 minutes to 4 hours to address. The \$207 is a weighted average charge per question.

See [www.teamswin.net](http://www.teamswin.net) Heavylifting Proposal page and blogs for more detail on our proposal to Consultants, Accountants, and Business Owners. We prefer to use an agent either Consultant or Accountant for communicating how to use the information, but we also want to show customers how they can produce most of the process.

## **Appendix: Gonzaga's System Requirements**

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### ***Five Functions***

Student Information  
Finance  
Alumni Relations  
Government Relations  
Payroll

### ***Five Reports***

Monthly Student Report  
Monthly Finance Trial Balance

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Monthly Alumni Report  
Annual Government Relations Report  
Pay Period Payroll

## **Data is used for:**

- Cradle-to-grave tracking of student's university experience.
  - This spans the continuum from first interest in Gonzaga to legacy giving.
- Day-to-day business operations,
- Opportunities for historical research.

## **Functions:**

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## **Appendix I – Core Business Applications/Functions in Use at Gonzaga**

### **• Student Information System**

- Admissions
- Registrar
- Housing/residence
- Financial aid
- Certification
- Student accounts
- Student life

### **• Finance o G/L**

- Budgeting
- Fixed assets
- A/R
- Procurement – A/P
- Endowment management

### **• University Relations (Advancement)**

- Alumni relations
- Development
- Major gifts
- Annual/planned giving
- Government relations

### **• Human Resources**

- HRIS
- Payroll

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- **Academics**

- o Degree audit
- o Career services

## ***Understand the Business – requirements derived from Gonzaga staff and management***

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- • Gonzaga University has an ongoing and growing need for complex software applications and functions.
- • The University needs a system that supports all its business functions.
- • All business functions need to be integrated.
- • It is mandatory that business processes and practices are well defined, supported, and enforced by Gonzaga's business applications.
- • There is a business requirement for accurate, clean, stable, current and historical data.
- • The data must be available real time to users across multiple departments and business functions.
- • Gonzaga University needs to put forth the appearance of technical and technology leadership.
- • Gonzaga needs a system that easily Web enables all business applications and functions.
- • Gonzaga University competes for top students. It is an expectation of all University stakeholders that they can interact with Gonzaga's applications through a Web interface or Portal.
- • It is also an expectation of faculty and staff that the University's systems will be easily accessed through browser technology.
- • Gonzaga is in a period of rapid growth and expansion. This has been driven by dynamic leadership, the Campaign for Gonzaga, academic and teaching excellence, standout programs like the Hogan Entrepreneurial Leadership Program and a hot basketball team. Business applications are the foundation of a business. It would not be prudent to consider replacing foundation applications during this period of change.
- • There assuredly is not an appetite within the University to change software applications and disrupt business.