

## Jolley, Kate

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**From:** Jolley, Kate  
**Sent:** Sunday, February 20, 2022 6:48 AM  
**To:** Jolley, Kate  
**Cc:** Avila, Pedro; Durand, Gene; Jarrett, Stephanie; Saldana-Talley, Jane; Snyder, Kevin; Thompson, Julie; Weatherly, Debbie; Webb, Don  
**Subject:** Demonstrations for Enterprise Resource Planning / Student Information System (ERP/SIS)  
**Attachments:** SRJC Ellucian Vendor Demonstration Agenda March 28-April 1 - April 20 2022 .pdf; SRJC Anthology Vendor Demonstration Agenda April 11-15 - April 19 2022 .pdf

Sent bcc: dl.staff.all

Dear SRJC Community,

As previously communicated, the District has been soliciting bids for an ERP/SIS (Enterprise Resource Planning / Student Information System). Two vendors have been selected to conduct system demonstrations for the college community. The two vendors selected were Ellucian/Banner and Anthology.

The demonstrations will be virtual and will each take a full week, with individual sessions focused on different functions. We will be seeing the vendors on the following timeline, and schedules are attached:

- Ellucian/Banner - March 28 - April 1, 2022
- Anthology - April 11 - April 15, 2022
- Anthology - April 19 and Ellucian - April 20, 2022 (IT and Institutional Research sections only)

All information on demonstration schedules, recordings of the sessions, Zoom links, demonstration scripts and feedback survey links will be available online. A link to that website will be provided prior to the demonstrations. Additional information on how to provide feedback will be given at the demonstrations and in a future update.

We recognize that this decision touches every employee and student in this college and are committed to an inclusive, transparent and participatory process. The vendor demonstrations [are](#) open to any employee interested in participating. It will take a large group of District employees working together to effectively view and grade these products.

Sincerely,

The ERP/SIS Steering Committee

Pedro Avila  
Gene Durand  
Steph Jarrett  
Kate Jolley  
Jane Saldana-Talley  
Kevin Snyder  
Julie Thompson  
Debbie Weatherly  
Don Webb

Kate Jolley

Vice President, Finance and Administrative Services



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*I acknowledge that Santa Rosa Junior College is on the territorial traditional land of the Pomo People in Santa Rosa and the Coast Miwok People in Petaluma, past and present, and honor with gratitude the land itself and the people who have stewarded it throughout the generations.*

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**Ellucian Vendor Demonstration Agenda  
March 28-April 1 and April 20, 2022**


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<b>Day 1 Monday, March 28, 2022</b>			
<b>Module Area</b>	<b>Topics</b>	<b>Approximate Time</b>	<b>Location</b>
General Session	Session 1 <ul style="list-style-type: none"> <li>■ Overview of Vendor Enterprise Solution, and General Navigation of System</li> </ul>	8:30AM – 10:00AM	
Break		10:00 AM – 10:15 AM	
Instruction Office	Session 2 <ul style="list-style-type: none"> <li>■ Catalog</li> <li>■ Schedule of Classes</li> <li>■ Faculty Load</li> </ul>	10:15 AM – 12:15 PM	
Lunch		12:15 PM – 1:00 PM	
Student	Session 3 <ul style="list-style-type: none"> <li>■ CRM Prospect and Recruiting</li> </ul>	1:00 PM – 3:00PM	
Break		3:00 PM – 3:15 PM	
Student	Session 3b <ul style="list-style-type: none"> <li>■ Admissions, Orientation, Assessment, Transcript Evaluation, Initial Ed Plan</li> </ul>	3:15 PM – 4:45 PM	

<b>Day 2 Tuesday March 29, 2022</b>			
<b>Module Area</b>	<b>Topics</b>	<b>Approximate Time</b>	<b>Location</b>
Student	Session 4 <ul style="list-style-type: none"> <li>■ Registration</li> </ul>	8:15 AM – 10:30 AM	
Break		10:30 AM – 10:45 AM	
Student	Session 5 <ul style="list-style-type: none"> <li>■ Academic Records – Rosters, Grades &amp; Transcripts</li> </ul>	10:45 AM – 12:15 PM	
Lunch		12:15 PM – 1:00 PM	
Student	Session 6 – for non-Counselors <ul style="list-style-type: none"> <li>■ Academic Advising, Counseling, Student Educational Plans, Degree Audit</li> </ul>	1:00 PM – 2:45 PM	
Break		2:45 PM – 3:00 PM	
Student Accounts	Session 7 <ul style="list-style-type: none"> <li>■ Fee Assessment</li> <li>■ Cashiering and Application of Payments</li> <li>■ Student Accounts Receivable</li> </ul>	3:00 PM – 4:45 PM	

<b>Day 3 Wednesday, March 30, 2022</b>			
<b>Module Area</b>	<b>Topics</b>	<b>Approximate Time</b>	<b>Location</b>
Financial Aid	Session 8 <ul style="list-style-type: none"> <li>■ Financial Aid – General Processing</li> </ul>	8:00 AM – 10:30 AM	

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**Ellucian Vendor Demonstration Agenda  
March 28-April 1 and April 20, 2022**

Break		10:30 AM – 10:45 AM	
Financial Aid	Session 8b ■ Funds Management/Work Study/ Scholarships/ Loans	10:45 AM – 12:15PM	
Lunch		12:15 PM – 1:00 PM	
Financial Aid	Session 8b - continued ■ Funds Management/Work Study/ Scholarships/ Loans	1:00 PM -2:30 PM	
Break		2:30 PM – 2:45 PM	
Finance	Session 9 and 9b ■ Chart of Accounts/General Ledger ■ Budgeting Planning and Management	2:45 PM – 5:00 PM	

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**Ellucian Vendor Demonstration Agenda  
March 28-April 1 and April 20, 2022**

<b>Day 4 Thursday, March 31, 2022</b>			
<b>Module Area</b>	<b>Topics</b>	<b>Approximate Time</b>	<b>Location</b>
Finance	Session 10 and 10b ■ General Accounting, Journal Entries, Cash Management & Period and Fiscal Year Closing ■ Grants Management and Accounting	8:00 AM – 10:00 AM	
Break		10:00 AM – 10:15 AM	
Finance	Session 11 ■ Procurements - Purchasing - Requisitions - Accounts Payable-Fixed Assets.	10:15 AM – 12:45 PM	
Student	Session 19 – Concurrent Session ■ Categorical Programs – DSPS, EOPS, CalWORKs & Foster Youth.	10:15 AM – 12:15 PM	
Lunch		12:45 PM – 1:15 PM	
Finance	Session 12 ■ Travel and Expense Management	1:15 PM – 2:15 PM	
Counseling & Advising	Session 6 – for Counselors ■ Academic Advising, Counseling, Student Educational Plans, Degree Audit, Note tracking	2:00 PM – 4:30 PM	
Break		2:15 PM – 2:30 PM	
HR and Payroll	Session 13 ■ Position Control/Position Management	2:30 PM – 4:45 PM	

<b>Day 5 Friday, April 1, 2022</b>			
<b>Module Area</b>	<b>Topics</b>	<b>Approximate Time</b>	<b>Presenter(s)</b>
HR and Payroll	Session 14 ■ Applicant Tracking and On-boarding	8:15 AM – 9:45 AM	
Break		9:45 AM – 10:00 AM	
HR and Payroll	Session 15 and 15b ■ General HR and Salary Management ■ Benefits Management	10:00 AM – 12:30 PM	
Lunch		12:30 PM – 1:00 PM	
HR and Payroll	■ Session 16 ■ Time – Leave Tracking and Payroll Processing	1:00 PM – 3:45 PM	
Break		3:45 PM – 4:00 PM	
HR and Payroll	Session 16b ■ Performance Management	4:00 PM – 5:00 PM	

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**Ellucian Vendor Demonstration Agenda  
March 28-April 1 and April 20, 2022**

<b>Day 6 Wednesday, April 20, 2022</b>			
<b>Module Area</b>	<b>Topics</b>	<b>Approximate Time</b>	<b>Location</b>
General Session	Session 17 ■ Reporting Analytics and Institutional Research	8:30 AM – 10:30 AM	
Break		10:30 AM – 10:45 AM	
IT Session	Session 18 ■ Technology Review	10:45 AM-12:00 PM	
Lunch		12:00 PM – 12:45 PM	
IT Session	Session 18 – Continued ■ Technology Review	12:45 PM – 3:30 PM	

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**Anthology Vendor Demonstration Agenda  
April 11-15 and April 19, 2022**

<b>Day 1 Monday, April 11, 2022</b>			
<b>Module Area</b>	<b>Topics</b>	<b>Approximate Time</b>	<b>Location</b>
General Session	Session 1 <ul style="list-style-type: none"> <li>■ Overview of Vendor Enterprise Solution, and General Navigation of System</li> </ul>	8:30AM – 10:00AM	
Break		10:00 AM – 10:15 AM	
Instruction Office	Session 2 <ul style="list-style-type: none"> <li>■ Catalog</li> <li>■ Schedule of Classes</li> <li>■ Faculty Load</li> </ul>	10:15 AM – 12:15 PM	
Lunch		12:15 PM – 1:00 PM	
Student	Session 3 <ul style="list-style-type: none"> <li>■ CRM Prospect and Recruiting</li> </ul>	1:00 PM – 3:00 PM	
Break		3:00 PM – 3:15 PM	
Student	Session 3b <ul style="list-style-type: none"> <li>■ Admissions, Orientation, Assessment, Transcript Evaluation, Initial Ed Plan</li> </ul>	3:15 PM – 4:45 PM	

<b>Day 2 Tuesday April 12, 2022</b>			
<b>Module Area</b>	<b>Topics</b>	<b>Approximate Time</b>	<b>Location</b>
Student	Session 4 <ul style="list-style-type: none"> <li>■ Registration</li> </ul>	8:15 AM – 10:30 AM	
Break		10:30 AM – 10:45 AM	
Student	Session 5 <ul style="list-style-type: none"> <li>■ Academic Records – Rosters, Grades &amp; Transcripts</li> </ul>	10:45 AM – 12:15 PM	
Lunch		12:15 PM – 1:00 PM	
Student	Session 6 – for non-Counselors <ul style="list-style-type: none"> <li>■ Academic Advising, Counseling, Student Educational Plans and Degree Auditing</li> </ul>	1:00 PM – 2:45 PM	
Break		2:45 PM – 3:00 PM	
Student Accounts	Session 7 <ul style="list-style-type: none"> <li>■ Fee Assessment</li> <li>■ Cashiering and Application of Payments</li> <li>■ Student Accounts Receivable</li> </ul>	3:00 PM – 4:45 PM	

<b>Day 3 Wednesday, April 13, 2022</b>			
<b>Module Area</b>	<b>Topics</b>	<b>Approximate Time</b>	<b>Location</b>
Financial Aid	Session 8 <ul style="list-style-type: none"> <li>■ Financial Aid – General Processing</li> </ul>	8:00 AM – 10:30 AM	

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**Anthology Vendor Demonstration Agenda  
April 11-15 and April 19, 2022**

Break		10:30 AM – 10:45 AM	
Financial Aid	Session 8b ■ Funds Management/Work Study/ Scholarships/ Loans	10:45 AM – 12:15PM	
Lunch		12:15 PM – 1:00 PM	
Financial Aid	Session 8b - continued ■ Funds Management/Work Study/ Scholarships/ Loans	1:00 PM -2:30 PM	
Break		2:30 PM – 2:45 PM	
Finance	Session 9 and 9b ■ Chart of Accounts/General Ledger ■ Budgeting Planning and Management	2:45 PM – 5:00 PM	



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**Anthology Vendor Demonstration Agenda  
April 11-15 and April 19, 2022**

<b>Day 4 Thursday, April 14, 2022</b>			
<b>Module Area</b>	<b>Topics</b>	<b>Approximate Time</b>	<b>Location</b>
Finance	Session 10 and 10b ■ General Accounting, Journal Entries, Cash Management & Period and Fiscal Year Closing ■ Grants Management and Accounting	8:00 AM – 10:00 AM	
Break		10:00 AM – 10:15 AM	
Finance	Session 11 ■ Procurements - Purchasing - Requisitions - Accounts Payable-Fixed Assets.	10:15 AM – 12:45 PM	
Student	Session 19 – Concurrent Session ■ Categorical Programs – DSPS, EOPS, CalWORKs & Foster Youth.	10:15 AM – 12:15 PM	
Lunch		12:45 PM – 1:15 PM	
Finance	Session 12 ■ Travel and Expense Management	1:15 PM – 2:15 PM	
Counseling & Advising	Session 6 – for Counselors ■ Academic Advising, Counseling, Student Educational Plans, Degree Audit, Note tracking	2:00 PM – 4:30 PM	
Break		2:15 PM – 2:30 PM	
HR and Payroll	Session 13 ■ Position Control/Position Management	2:30 PM – 4:45 PM	

<b>Day 5 Friday, April 15, 2022</b>			
<b>Module Area</b>	<b>Topics</b>	<b>Approximate Time</b>	<b>Presenter(s)</b>
HR and Payroll	Session 14 ■ Applicant Tracking and On-boarding	8:15 AM – 9:45 AM	
Break		9:45 AM – 10:00 AM	
HR and Payroll	Session 15 and 15b ■ General HR and Salary Management ■ Benefits Management	10:00 AM – 12:30 PM	
Lunch		12:30 PM – 1:00 PM	
HR and Payroll	■ Session 16 ■ Time – Leave Tracking and Payroll Processing	1:00 PM – 3:45 PM	
Break		3:45 PM – 4:00 PM	
HR and Payroll	Session 16b ■ Performance Management	4:00 PM – 5:00 PM	

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**Anthology Vendor Demonstration Agenda  
April 11-15 and April 19, 2022**

<b>Day 6 Tuesday, April 19, 2022</b>			
<b>Module Area</b>	<b>Topics</b>	<b>Approximate Time</b>	<b>Location</b>
General Session	Session 17 ■ Reporting Analytics and Institutional Research	8:30 AM – 10:30 AM	
Break		10:30 AM – 10:45 AM	
IT Session	Session 18 ■ Technology Review	10:45 AM-12:00 PM	
Lunch		12:00 PM – 12:45 PM	
IT Session	Session 18 – Continued ■ Technology Review	12:45 PM – 3:30 PM	