

CampusWorks has provided Banner services to the following clients:

Aims Community College, CO

Cochise College, AZ

Coconino Community College, AZ

Gulf Coast State College, FL

Harford Community College, MD

Lakeland Community College, OH

Moraine Park Technical College, WI

Southern Connecticut State University, CT

SUNY Orange, NY

Touro College and University System, NY

University of Scranton, PA

University System of New Hampshire, NH

# Navigating the Banner 9 Upgrade

## Student Experience, Technology Transformation & Optimization

With the clock ticking on the Banner 9 migration deadline, many institutions are in the midst of “figuring it all out.” Whether you are almost done, in the middle of migration or still planning to kick off this fall, CampusWorks can provide lessons learned from over a dozen Banner 9 migrations and share essential insights to ensure a successful transition.

### Tips for a Successful Banner 9 Migration

#### 1. It's more than an IT project.

This transition is an opportunity to create momentum, strengthen your institution's technology environment, drive business process improvements, and deliver a better experience for students, faculty, and staff.

#### 2. Establish an upgrade organizational team.

The upgrade team should include representatives from functional offices that interact with Banner to ensure that all aspects of system utilization are taken into account and an effective reporting structure is in place.

#### 3. Know where you are and where you want to be.

As with many projects, success begins with preparation. By conducting an assessment of your current Banner environment, you will gain a comprehensive understanding of the system and the technology infrastructure supporting it, which will illuminate variables that will impact the project's cost and timeline and help you determine the best path forward.

#### 4. Determine cloud readiness.

Use the Banner 9 transition to help your institution become “cloud ready.” Since migrating to Banner 9 will require you to review, possibly modify, and test current customizations and integrations, this an excellent time to assess existing documentation, revise institutional policies, and develop a plan for future changes to ensure your institution is ready to take advantage of cloud applications and next generation student information systems.

#### 5. Engage students.

Engage students early in the process to test the Banner 9 system and begin familiarizing themselves with the modernized user interface and new functionality. Poor deployment timing or roll-out could adversely impact students during registration, financial aid awarding, or other critical events during the term.

#### 6. Avoid a “one-size-fits-all” approach.

Leverage the findings from your technology assessment to create a project plan that is tailored to your institution's unique needs and strategic goals. Since your administrative system touches so many areas of the institution, a custom approach will enable you to get the most value out of your ERP environment.

# Banner 9 Services

## Readiness Assessment

Conducting a technology assessment at the outset will give you a holistic view of the current state of IT at your institution, arming your team with actionable information that will be useful throughout this process and beyond.

## Business Process Review

- Establish which processes need to be redesigned in order to support the institution's desired future state and get the most value out of your administrative system.
- Standardize business processes, diminish customizations, and improve data quality.

## Project Management

- Preparation and project planning
- Banner 9 install, testing, and parallel run
- Cutover to production
- Fit-Gap Analysis
- Identity management integration using Ellucian Ethos Identity (EEI)
- Ethos platform adoption recommendations
- Security classifications
- Data integrity/standards
- Upgrade or convert Oracle forms, as scoped
- Build virtualized Banner 9 environment

## Banner Technical and Functional Support

- DBAs, Financial Aid Specialists, Enrollment Management Specialists, Advancement Specialists, HR Specialists, Finance Specialists, Analytics & Reporting

### Banner 9 Project Plan Components

#### Infrastructure Updates

Identify hardware and software to be updated or replaced to strengthen your infrastructure.

#### Bandwidth

Whether considering cloud offerings or increased mobile access, bandwidth must support the increased demand for accessibility.

#### Business Process Redesign

Establish which processes need to be redesigned in order to support the institution's desired future state and get the most value out of your administrative system.

#### Data Migration

Develop a database upgrade plan to ensure that no data is lost during the migration and that the cutover to production is as seamless as possible.

#### Third-Party Integrations

Identify the third-party applications that will need to be integrated.

#### Staff Training

Create a training plan to ensure that all stakeholders are comfortable with the system's new user interface and functionality.

#### Testing

Develop a testing plan that includes a sandbox environment to familiarize stakeholders with the new environment and complete verification and validation testing before going live.

#### Cutover

Create a parallel run, testing phase, and cutover plan to ensure a smooth transition.

### A Banner 9 Readiness Assessment Answers Important Questions

How many customizations exist within the current Banner environment?

Which ones are actively used?

What is your institution's desired future state?

Where do functionality gaps exist?

Is your current hardware and infrastructure capable of supporting Banner 9?

Which components need to be upgraded or replaced?

What are your college's strategic goals as they pertain to cloud and mobile?

Are there impediments or vulnerabilities that could impede success?

Does your college have the technical expertise on staff to support an upgrade or transition?

Is outside help needed?

Are your people and processes ready for change?