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Overcoming the Challenges of XE Upgrades at the University of Illinois

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University of Illinois

April 20, 2016

Session ID 38493

Introduction



- **University of Illinois and Banner XE**
 - Who we are...
 - What we do...
 - How we do it...

University of Illinois



- **Three campuses (Urbana-Champaign, Chicago, Springfield) www.uillinois.edu**
 - Urbana-Champaign – 46K students
 - Chicago – 29K students
 - Springfield – 5K students
- **23,500 employees**
- **\$5.6B budget**



Agenda



- 1** Considerations for moving to XE

- 2** University of Illinois – XE Apps

- 3** Why has Illinois been successful

- 4** Importance of Development Partner Groups and Beta Testing

- 5** Perspective from Business Units vs. IT

- 6** Summary

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Considerations for moving to XE

Considerations for moving to XE



- **Business Cycles**
- **Modifications**
- **Testing**
- **Dependencies with other releases**
- **Other technical considerations**

Considerations for moving to XE



- **Business Cycles**



Considerations for moving to XE

Illinois Blackout Calendar

2015-16 Outage Calendar				
Sunday	Outage Status		Business Unit Impacted	Business Activity
	Standard (6:00 a.m. to 12:00 noon)	Extended (6:00 a.m. to 6:00 p.m.)		Key Black -Critical Business Events Occurring, No Planned Outages Yellow -Key Processing Occurring, Check with Key Units concerning Outage Green -Normal Business Processing, Outages can be scheduled
2-Aug				Xtender Upgrade (6-12 outage)
9-Aug			HR, ST(UIUC/UIC/UIS)	Solaris/Linux 6-6
16-Aug			ST/FN/HR	1st Fall Assessment/Disbursement processing/Windows patching if necessary on 8/16
23-Aug			ALL	Fall 2015 Classes begin on 8/24 for all campuses
30-Aug			ST/HR	HR still doing heavy processing of new hires; 10th Day census is 9/4
6-Sep			AITS	Labor Day Holiday; Monthly Payroll cut off is 9/7
13-Sep				
20-Sep				Financial Aid upgrade 6-12
27-Sep				Fall Student Accounts Receivable bills due September 28
4-Oct				IAM Go-live on 10/3/Open House at UIC. Watch for connectivity and network items
11-Oct				Solaris/Linux Maintenance 6-6; Admissions Transfer Deadline of 10/15; Placement Testing Upgrade @ UIC
18-Oct				Windows Production patching
25-Oct				Banner Student and Finance Upgrade 6:00 a.m. to approx. 8:00 p.m. on Saturday, October 24; Date changed to Saturday due to need to be done by 6:00 p.m. on Sunday. Payroll kicks off at 7:00 p.m. on Sunday, October 25
1-Nov			ST (All)	Priority Registration begins on 11/2, Early Action Admissions deadline at UIC on 11/2
8-Nov			ST (All)	Priority Registration/
15-Nov			ST (All)	Priority Registration ends on 11/20. Willing to have a yellow 6-12?/Windows Patching/IBuy upgrade is November 13-15; testing is November 15 in the afternoon
22-Nov				Proposed Financial Aid upgrade 6-12 (Move to Saturday, 11/21 because of Thanksgiving week and a shortened payroll schedule) Caution Windows impact for Undergraduate admissions
29-Nov			AITS	Thanksgiving weekend; Urbana Undergrad Admissions Deadline is 12/1
6-Dec				Start of End of Term Activities
13-Dec			ST (UIC)	End of Term activities, Grades due
20-Dec			ST (UIUC/UIS)	End of Term activities/End of Year Activities/Holidays; Grades due at UIS on 12/23
27-Dec			ST (All)	January 1 Admissions Deadline
3-Jan			ST (All)	Disbursement/Assessment processing for UIC
				Start of term activities, Classes begin at UIC on 1/11; Disbursement/Assessment processing for Urbana and Springfield on 1/8-9, Undergrad Admissions deadline at UIC on 1/15
10-Jan			ST (All)	Start of term activities, Classes begin at UIS and Urbana on 1/19 and 10th day

Considerations for moving to XE



- **Modifications**

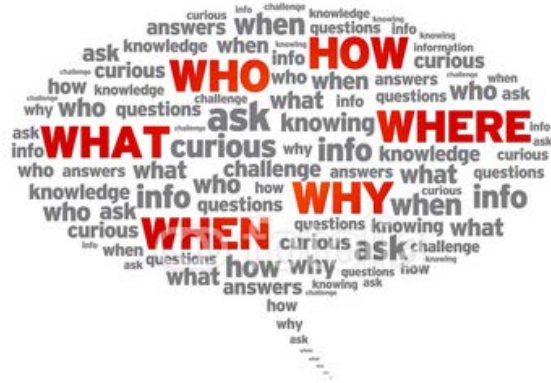
- How many?
- Impact to upgrade?
- How long will the changes take?

Considerations for moving to XE



- **Testing**

- Who?
- How much?
- How long?



Considerations for moving to XE



- **Dependencies with other releases**
 - What type?
 - Banner 8, Database Upgrades, XE Releases
 - University of Illinois examples
 - Additional time for install and testing – impact?



Considerations for moving to XE



- **Other technical factors to consider**
 - Ellucian Solution Manager (ESM)
 - ESM & Multi-Entity Processing (MEP)
 - Single sign-on

Considerations for moving to XE



- **Ellucian Solution Manager (ESM)**
 - Required for deployment of Transformed pages
 - Learning curve to get it installed and assimilated into your IT environment
 - Limitations with granting access to ESM
 - Everyone is an Administrator
 - Documentation regarding existing releases and new upgrades/releases is beneficial



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University of Illinois - Environment: BANDEV BANDEV

Product: Banner Student 8.9.2 Documentation Links

Documentation Links

- [Banner_Student_Object_List_8.9.2.pdf](#)
- [Banner_Student_Release_Guide_8.9.2.pdf](#)
- [Banner_Student_Resolutions_8.9.2.txt](#)
- [Banner_Student_Upgrade_Guide_8.9.2.pdf](#)
- [Banner_Student_d_readme_8.9.2.txt](#)
- [Banner_Student_u_readme_8.9.2.txt](#)

Download All OK

ellucian. ELLUCIAN SOLUTION MANAGER 1.6 (BUILD MAIN_ADMIN_20160309.6) Help About Sign Out

University of Illinois - Environment: BANDEV BANDEV

Product: Banner Application Navigator (BXE_APPNAV) [Application: BANDEV]

Target Release	Rel Doc	Available Upgrade Release	Release Date
<input checked="" type="radio"/>		1.4	2016-03-07 05:00:01.0
<input type="radio"/>		1.3.2	2016-01-27 05:00:01.0
<input type="radio"/>		1.3.1.1	2016-02-27 05:00:01.0
<input type="radio"/>		1.3.1	2015-10-23 04:00:01.0
<input type="radio"/>		1.1	2014-12-12 05:00:01.0

Other Selected and Pre-requisite Releases

Rel Doc	Product	Application	Release Version	Release Date
	Banner General	BANDEV	8.8.4	2016-03-11 05:00:01.0
	Banner General	BANDEV	8.8	2015-09-30 04:00:01.0



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University of Illinois - Environment: BANDEV BANDEV

Products

- Upgrades
- Deployments
- Links
- Env Settings
- Applications
- App Servers
- Machines
- Credentials

Name	Type	Application	Current Installed Release	Latest Available Release	Selected Target Release
Banner 9 Online Help	BannerERP	BANDEV			
Banner 9x Database Upgrade	BannerERP	BANDEV	9.1.0.4	9.3	
Banner Accounts Receivable	BannerERP	BANDEV	8.5.0.3		
Banner Advancement	BannerERP	BANDEV	7.3		
Banner Advancement Self-Service	BannerERP	BANDEV	7.3		
Banner Application Navigator	BannerERP	BANDEV		1.3.2	
Banner Document Management System	BannerERP	BANDEV	8.6.0.2		
Banner Employee Profile App	BannerERP	BANDEV		9.0.4	
Banner Employee Self-Service	BannerERP	BANDEV	8.12.1	8.12.1.3	
Banner Faculty Attendance Tracking Self Service	BannerERP	BANDEV			
Banner Faculty Grade Entry	BannerERP	BANDEV	9.2.0.1	9.4.0.2	
Banner Faculty and Advisor Self-Service	BannerERP	BANDEV	8.7.1	8.7.1.2	
Banner Finance	BannerERP	BANDEV	8.10.1.3	8.10.1.4	

Considerations for moving to XE



• ESM and Multi-Entity Processing (MEP)

- ESM 1.4 and up, support installation and deployment of Banner transformation releases, whether clients are MEP or not
- ESM does NOT support automated upgrade installation for Banner 8.x upgrades and patches or Banner 9.x releases (other than transformation releases) for MEP modules
 - Database upgrades require intervention in the middle of the upgrade when being installed in MEP environments, which is incompatible with ESM's automated non-interactive batch processing of upgrade installations
- MEP clients can use ESM to install transformation releases, but have to manually install any MEP-aware Banner 8.x pre-requisites prior to that
- Currently no date/release for ESM/MEP support

Considerations for moving to XE



- **Single Sign-on**

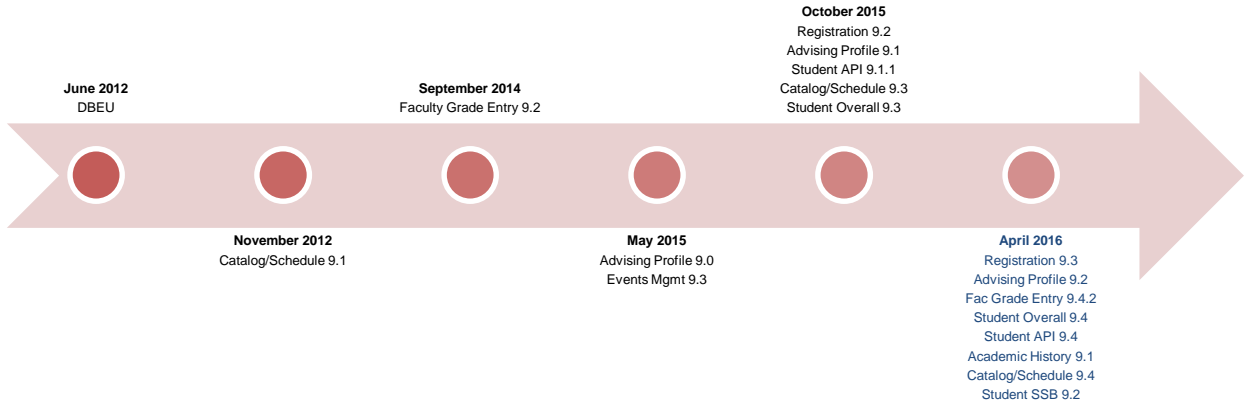
- Single sign-on between XE apps requires Application Navigator (otherwise, legacy authentication can be used)
- Ellucian Identity Service (EIS) is currently the only SAML2 Identity Provider certified with Application Navigator and Transformed pages
- Transformed forms require Application Navigator and EIS

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University of Illinois – XE Apps

Banner XE timeline



Current XE Production Environment



- Database Extension Util (DBEU)
- Student Faculty Grade Entry 9.2 (Active)
- Student Course Catalog 9.3
- Student Class Schedule 9.3
- Student Advisor Self Service 9.1
- Student Advisor 9.1
- Student API 9.1.1
- Student Overall 9.3
- Student Registration 9.2 (Limited)
- General Events Mgmt 9.3 (Active)
- Banner DB Upgrade 9.1

The Good, The Bad and The Ugly



Student Course Catalog and Class Schedule 9.3



- **Performance issues initially**
- **Accessibility issues**
- **No incentive to move to administrative forms in Banner 9**
 - Not using Application Navigator in production currently, so no way to go back and forth between Banner 8 and 9
- **Training needs for administrative users**

Faculty Grade Entry 9.2



- **Faculty are very happy with the spreadsheet load – import/export of grades**
- **Faculty are presented with their courses immediately – they don't have to drilldown through multiple menus**
- **Better interface than Banner 8 – the “XE” experience**
 - Visual indicators – i.e. red/green on failure/success
- **Accessibility issues**
- **Security configuration was tricky**

Student Advising Profile 9.1



- **Advisors get a full picture of a student vs. needing to go to multiple pages/clicks**
- **SAP provides for a better interface – modern “XE” experience**
- **Ability to include a student image**
- **Highly configurable – good and bad**
- **Accessibility issues**
- **MEP issues**

Events Management 9.3



- **Can be used for all modules; currently only being used by Student at U of I at Chicago**
 - Used for Open Houses for new Students, Summer Programs for incoming students, UIC Convocation (4,161 attendees)
- **Limited use as it doesn't create recruit records**
- **Performance has been fine, after waiting for EM 9.3**
- **Accessibility issues to be fixed in EM 9.4**
- **Existing defect that prevents error message from being displayed if registrant tries to register for event they don't qualify for**

Student Registration 9.2



- **Better interface for students than Banner 8**
- **Ability to drop last class**
- **Used for Urbana's winter term – no negative feedback from students**
- **Accessibility issues**
- **MEP Issues**
- **Critical defects have been an issue – working with Ellucian to resolve**

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University of Illinois – XE Apps Not Yet in Production

XE Apps not in Production – Why?



- **Employee Profile**

- Existing Self-Service meets current needs
- Many mandatory HR projects in progress
- HR/Payroll clients want to move forward with transformed forms prior to Employee Profile
- Possible timeframe – not yet determined

XE Apps not in Production – Why?



- **Banner HR Transformed Forms**

- Homegrown HR Front-end System meets majority of administrative form needs
- Many mandatory HR projects in progress
- Possible timeframe – not yet determined; will be based on priorities with other mandatory projects

XE Apps not in Production – Why?



- **Position Description**

- Existing application meets current needs
- Many mandatory HR projects in progress
- Possible timeframe – not yet determined

XE Apps not in Production – Why?



- **Communication Manager**
 - BRM provided functionality for current needs – no additional functionality was provided with Release 1
 - Planning to test Release 2 in Spring 2016 – will evaluate the new functionality (for example, scheduling function) and determine production readiness

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University of Illinois – Why are we Successful?

Why are we successful with XE?



- **Great interaction between functional and technical staff**
- **Knowledgeable technical staff**
- **We file cases on the Support Center and use eCommunities**
- **Plan, plan, plan**
- **Don't overpromise/overcommit**
- **Get involved – Development partner groups/Beta testing**

Why are we successful with XE?



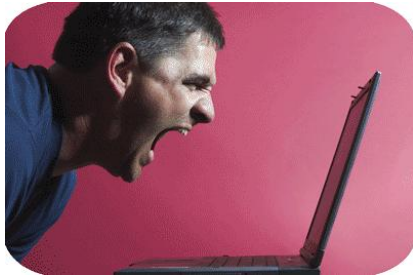
- **Great interaction between functional and technical staff**



Why are we successful with XE?



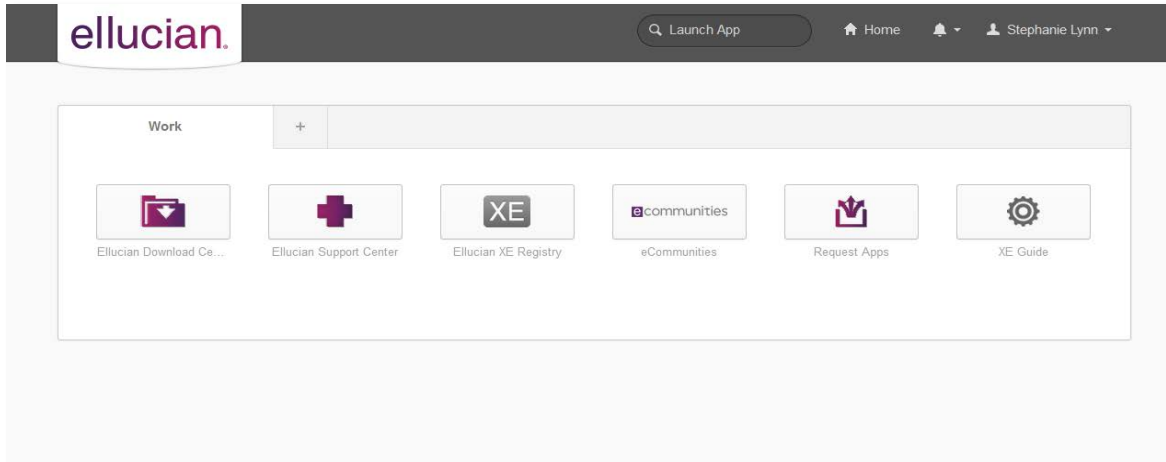
- Knowledgeable technical staff



Why are we successful with XE?



- We file cases on the Support Center and use eCommunities



Why are we successful with XE?



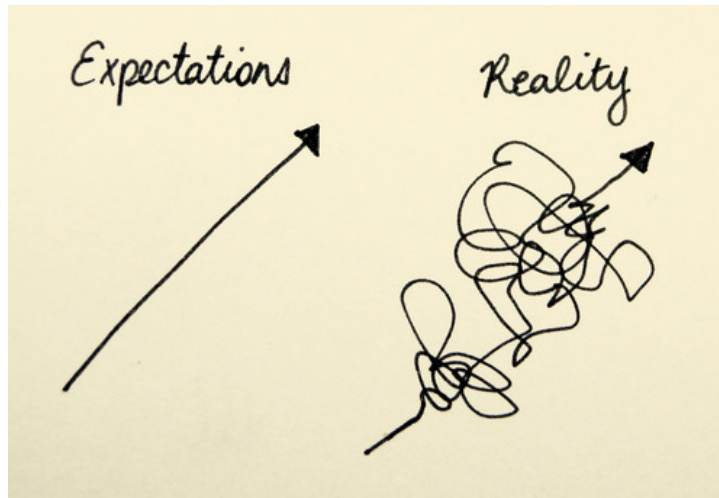
- Plan, plan, plan



Why are we successful with XE?



- Don't overpromise/overcommit



Why are we successful with XE?



- **Get involved**
 - Development Partner Groups
 - Beta Testing



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Development Partner Groups and Beta Testing

Development Partner Groups



- **Academic History**
- **Student Registration**
- **Employee Profile**
- **Position Description**
- **Finance Self-Service Purchase Requisition**
- **Budget Availability**

Development Partner Groups



- **Platform Solutions**
- **Communications Manager**
- **ACA Year-end**
- **Salary Planner**

Development Partner Groups



Emily Panzica Jan 11, 2016 5:54 AM

Call for Development Partners: Enhancements to Banner Student Test Scores and Codes

Banner Student is embarking on a project to enhance functionality around Test Codes and Test Scores. There are three improvements that we are looking to incorporate that we believe will be beneficial for all clients. We would like to gather feedback on the impact of these changes as well as testing partners, and need your assistance! I have briefly outlined the three changes below.

1. Allow the Number of Positions on STVTEC to be a maximum. Currently, the Number of Positions on STVTEC acts as an absolute. When you define a test score as 4 positions, the score must be entered as 0004 or 4.00, but cannot be entered as 4. This change would allow an institution to define a test score as having 4 positions, and then allow a score to be entered as 4 or 24 or 400.
2. Expand the test code length to allow up to 6 characters. Currently, the test code length only allows 4 characters.
3. Expand the test score length to allow up to 15 characters. Currently, the test score length only allows 5 characters.

We would like to partner with institutions as we explore the best way to incorporate these enhancements and still ensure that the functionality around test scores and codes will work for all clients globally. We are currently looking for feedback on the planned changes, but we will also need institutions who will be able to help us test the new functionality once we get further into the development process. We greatly value and appreciate the time and effort involved in helping us improve upon Banner Student, and need your assistance as we move forward with this project.

Please let me know as soon as possible if your institution would be able to join this important development partner group! The time commitment at this point would be an hour or two every other week as we begin development. Once we have the new functionality available for testing, the time commitment would be the time needed for your institution to fully test the changes that have been made, along with other business process at your institution that may be impacted. Development partners must have sponsorship and commitment from both IT and the Functional units affected in order to ensure testing can be completed. This project is scheduled to run through March 2016.

If you have any questions, please let me know! I would love to talk with you about participating in this important development partner group.

Thank you,

Emily Panzica
Banner Student 8x Product Owner

16 Views Tags:

Reply

Beta Testing



- Finance Transformed Forms
- Student Transformed Forms



Benefits of Participating



- **Provide input into new functionality**
- **Get an early glimpse of new forms/functionality**
- **Put modules into production early so clients can begin using new functionality**
- **Early adoption = Better support from Ellucian**

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Difference in Perspectives

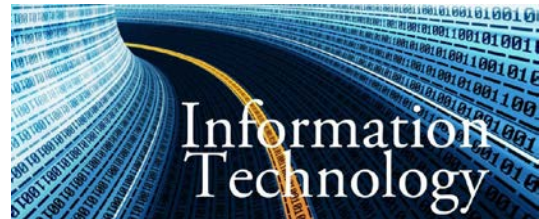
Perspective



- Business Unit vs. IT



vs.



Perspective – Business Units



- **Current business cycle**
- **How much testing is needed?**
- **Comparing existing functionality to the expected new functionality in XE**
- **Training needs**

Perspective – IT



- **Are we current on the latest release?**
- **Are there dependencies that we haven't planned for?**
- **What modifications do we need to look at?**
- **What defects exist, and what can we live with?**
- **What don't we know?**

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Summary

Summary



- **Be prepared**
 - Know your business cycles
 - Consider what modifications you have
 - Think about the extent of testing that should be done
 - Understand what dependencies may affect you
 - Understand your environment



Prepare

Summary

- **Consider all aspects of the XE modules**
 - Improvements to functionality
 - Training needs
 - Performance impacts
 - Accessibility concerns
 - Multi-entity Processing



Summary

- **Involvement is key**
 - From business offices...
 - From technical staff...
 - With Ellucian
 - Development Partner Groups
 - Beta Testing



Other University of Illinois Presentations



- **Planning and Executing Upgrades in the New World of XE** – Robyn Velazquez and Elizabeth McCarter (Monday, 2:00)
- **Lessons Learned: Implementation of XE Student Modules** – Elizabeth McCarter and Amanda Bland (Wednesday, 11:15)
- **XE Student Self-Service Configuration Methods** – Amanda Bland and Elizabeth McCarter (Tuesday, 10:00)
- **Navigating the Banner XE Architecture** – Brian Schoudel and John Tanner (Tuesday, 11:30)
- **Development Partners with Benefits** – Mike Nevill and Karen Sivils (Tuesday, 4:45)

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Questions & Answers

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Thank you!

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<http://tinyurl.com/elive2016surveys>

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