Planning & Executing Upgrades in the New World of XE

Robyn Velazquez
Beth McCarter
University of Illinois

April 18, 2016
Session rules of etiquette

• Please turn off your cell phone/pager

• If you must leave the session early, please do so as discreetly as possible

• Please avoid side conversation during the session

Thank you for your cooperation!
Introduction

- University of Illinois has incorporated XE modules into our ‘Big Bang’ Banner upgrades
- This impacts how we manage upgrade projects
- We’ll share our experience, issues we’ve encountered, and how project management has been impacted
<table>
<thead>
<tr>
<th></th>
<th>Agenda</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Who We Are</td>
</tr>
<tr>
<td>2</td>
<td>How We Do Upgrades</td>
</tr>
<tr>
<td>3</td>
<td>The New World of XE</td>
</tr>
<tr>
<td>4</td>
<td>Issues We Still Face</td>
</tr>
<tr>
<td>5</td>
<td>Q&amp;A</td>
</tr>
</tbody>
</table>
Who are We?
• Robyn Velazquez – Enterprise System Coordinator

• Beth McCarter – Assistant Director ESC Student Team

• Administrative Information Technology Services (AITS), University of Illinois

• We Provide technical support for enterprise level administrative services, including Banner
University of Illinois

• Three Campuses (Urbana-Champaign, Chicago, Springfield)  www.uillinois.edu

  • Urbana-Champaign
    o 44K Students, 11K Employees

  • Chicago
    o 28K Students, 10K Employees

  • Springfield
    o 5K Students, 2K Employees
AITS (Administrative Technology Services)

• Delivers enterprise-wide IT solutions and services in support of the mission critical functions of the University of Illinois. These functions include student services and financial aid, human resources and payroll, facilities, advancement, research administration, and finance.

• Has a presence at all three campuses and is the University-wide resource for computing, applications support, applications development, and data management in support of University business processes.
Banner 8.x Modules

• General
• Human Resources/Position Control
• Finance
• Accounts Receivable
• Student
• Financial Aid
• Workflow
• BDM
How We Do Upgrades
Planning

• Identify Upgrade Needs
  o Usually starts with the need of one functional area & others join in

• Pick an Implementation Date
  o We use a “Blackout Calendar” to identify available outage windows

• Decide When to Start the Project
  o Determined by AITS & end user tester availability

• Decide How Many Dress Rehearsals Are Needed
  o Typically 3, sometimes 4
# Blackout Calendar

## 2015-16 Outage Calendar

<table>
<thead>
<tr>
<th>Sunday</th>
<th>Outage Status</th>
<th>Business Unit Impacted</th>
<th>Business Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>2-Aug</td>
<td>Standard</td>
<td>HR; ST(UIUC/UIC/UIS)</td>
<td>Xtender Upgrade (6-12 outage)</td>
</tr>
<tr>
<td>9-Aug</td>
<td>Standard</td>
<td>ST/UIUC/UIC/UIS</td>
<td>Solaris/Linux 6.6</td>
</tr>
<tr>
<td>16-Aug</td>
<td>Extended</td>
<td>ST/EN/HR</td>
<td>1st Fall Assessment/Disbursement processing/Windows patching if necessary on 8/16</td>
</tr>
<tr>
<td>23-Aug</td>
<td>Standard</td>
<td>ALL</td>
<td>Fall 2015 Classes begin on 8/24 for all campuses</td>
</tr>
<tr>
<td>30-Aug</td>
<td>Standard</td>
<td>ST/HR</td>
<td>HR still doing heavy processing of new hires; 10th Day census is 9/4</td>
</tr>
<tr>
<td>6-Sep</td>
<td>Standard</td>
<td>AITS</td>
<td>Labor Day Holiday; Monthly Payroll cut off is 9/7</td>
</tr>
<tr>
<td>13-Sep</td>
<td>Standard</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20-Sep</td>
<td>Standard</td>
<td></td>
<td></td>
</tr>
<tr>
<td>27-Sep</td>
<td>Standard</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4-Oct</td>
<td>Standard</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-Oct</td>
<td>Standard</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-Oct</td>
<td>Standard</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19-Oct</td>
<td>Standard</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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
Structure of Upgrade Project

- Project Management Structure
- Databases
- Meetings
- Rollout Plans for Each DR and Go-Live Date
- Modifications
Upgrade Participants

Project Manager

Deployment Manager

External Application Admin

QA

DBAs

Development

Decision Support

Data Architects

Internal Application Admin

Deployment Specialists

Student Project Lead

HR Project Lead

Finance Project Lead

Fin Aid Project Lead

BDM Project Lead

General Project Lead

Project Team

Project Team

Project Team

Project Team

Project Team

End Users

End Users

End Users

End Users

End Users

End Users

End Users

End Users

End Users

End Users
Databases

• **Main Dress Rehearsal Databases**
  o This is where the majority of the testing occurs

• **Development Database**
  o All development work for upgrade modifications occurs here before moving changes to main DR databases

• **Reporting Database**
  o Optimized for reporting

• **Performance Testing Database**
  o Located on a production like server, separate from the other DBs
Upgrade Meetings

• Weekly Status Meeting
  ○ Project Leads & Management

• Leads Meeting
  • Project Leads

• Mods Meeting
  • Project Leads, Development, External Application Admin
Upgrade Meetings (continued)

• **Project Management “Touch Base”**
  - Project Manager, Deployment Manager, Deployment Specialists

• **Individual Team Status Meeting**
  - Functional Area Project Lead, Functional Area Testers, End Users
Rollout Plans

• Managed by the Deployment Group

• Lists All Activities Required to Create & Upgrade Database

• Over 150 Steps
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.00</td>
<td><strong>PRE STEPS</strong></td>
</tr>
<tr>
<td>X1.01</td>
<td>Scheduled time on calendars - (Tadi, Mikel, John T, copy Debbie, Robyn)</td>
</tr>
<tr>
<td>X1.02</td>
<td>CHECK SPACE on - to ensure there is room for new data</td>
</tr>
<tr>
<td>X1.03</td>
<td>CHECK SPACE on.copyOf - to make sure enough for new data</td>
</tr>
<tr>
<td>X1.04</td>
<td>CHECK SPACE on.copyOf for new data</td>
</tr>
<tr>
<td>X1.05</td>
<td>CHECK SPACE on.copyOf for new data</td>
</tr>
<tr>
<td>X1.06</td>
<td>EAS login -- Make sure that is COMMENTED OUT both in BI and SSA servlets EAS login servlets</td>
</tr>
<tr>
<td>X1.07</td>
<td>IF NOT - COMMENT IT OUT and ask EA Team (AITS, EA REQUESTS) to bounce the BI and SSA login servlets</td>
</tr>
<tr>
<td>X1.07</td>
<td>Send communication on exactly when will be down for upgrade</td>
</tr>
<tr>
<td>2.00</td>
<td><strong>DATABASE STEPS</strong></td>
</tr>
<tr>
<td>2.10</td>
<td>CREATE from a CLONE of - use a File for DRs - MAKE SURE PARMS match what we used in</td>
</tr>
<tr>
<td>2.11</td>
<td>MOVE from ZFS to Veritas -- about 2 hours</td>
</tr>
<tr>
<td>2.12</td>
<td>run the ksh script in</td>
</tr>
<tr>
<td>2.13</td>
<td>TUES FEB 2</td>
</tr>
<tr>
<td>2.14</td>
<td>Put in ARCHIVE LOG mode and kick off a FULL RMAN BACKUP</td>
</tr>
<tr>
<td>2.15</td>
<td>Double check that name is in LDAP and</td>
</tr>
<tr>
<td>2.16</td>
<td>Put backups on regular schedule - twice a week</td>
</tr>
<tr>
<td>2.20</td>
<td>CREATE on oradev - Rename on to - MAKE sure there is enough room for the new</td>
</tr>
<tr>
<td>2.21</td>
<td>TUES FEB 2</td>
</tr>
<tr>
<td>2.22</td>
<td>Put in ARCHIVE LOG mode and kick off a FULL RMAN BACKUP</td>
</tr>
<tr>
<td>2.23</td>
<td>Double check that name is in LDAP and</td>
</tr>
<tr>
<td>2.24</td>
<td>Put backups on regular schedule - twice a week</td>
</tr>
<tr>
<td>2.25</td>
<td>Fix DB links in to to go to</td>
</tr>
<tr>
<td>3.00</td>
<td><strong>APP SUPPORT STEPS</strong></td>
</tr>
<tr>
<td>3.01</td>
<td>TUES Feb 2 1 HR</td>
</tr>
<tr>
<td>3.02</td>
<td>VERIFY that Instance create has PCARD data to be scrambled</td>
</tr>
<tr>
<td>3.03</td>
<td>RENAME software tree on to - sync to</td>
</tr>
<tr>
<td>3.04</td>
<td>RENAME forms tree on to - sync to</td>
</tr>
<tr>
<td>3.05</td>
<td>MAKE SURE that the data for is correct -- to have the forms on and db on</td>
</tr>
<tr>
<td>3.06</td>
<td>When database is ready - run APP SUPPORT scripts</td>
</tr>
<tr>
<td>3.07</td>
<td>Run DBMaint/MaintenanceScripts/recreatebanner.sh -b</td>
</tr>
<tr>
<td>3.08</td>
<td>Includes start jobs and PIPES</td>
</tr>
<tr>
<td>TIME</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>14:00</td>
<td>Re-point XE APPS from [old] to [new].</td>
</tr>
<tr>
<td>14:01</td>
<td>After verifying with Keith W, on timing - Re-point XE Apps from [old] to [new] database.</td>
</tr>
<tr>
<td>14:02</td>
<td>LOG into BANNER, Student XE modules: Student Admitting Profile XE (Banner), Student Advising Self Service XE (Banner), Student Class Schedule XE (Banner), Student Course Catalog XE (Banner), Student Faculty Grade Entry XE (Banner), Student Registration Admin XE (Banner), Student Registration Self Service XE (Banner), Student Academic History (NEW - with Spring Upgrade 2016)</td>
</tr>
<tr>
<td>15:00</td>
<td>Scripts to run in [old].</td>
</tr>
<tr>
<td>16:00</td>
<td>CONFIG STEPS</td>
</tr>
<tr>
<td>17:00</td>
<td>Add new Forms Security</td>
</tr>
<tr>
<td>18:00</td>
<td>VERIFY [output] is GOOD</td>
</tr>
<tr>
<td>19:00</td>
<td>BACKUP [output].</td>
</tr>
</tbody>
</table>

**DATE**

**RESPONSIBILITY**

John T/K Keith W

Suzanne M

Mark

Robyn V

Sheila B.

Mark

Tadi
Modifications

• AllMods are Supported In-House
• Approximately 100 Mods Currently in Production
• Patch Tracker
  • System which tracks all of our installs & mods
• Collision Reports
  • Generated out of Patch Tracker
  • Shows any upgrade, patch, mod that’s impacted
• Impacted Mods Spreadsheet for Upgrades
# Patch Tracker

![Image of Patch Tracker interface]

## PMU Tracker 3.0.0

### PMU DATA
- **ID:** PCR-000134142_BWS8070102
- **Type:** PATCH
- **Priority:** MED
- **Status:** T
- **Title:** Banner Student Self-Service 8.7.2 Patch
- **Application:** BANNER
- **Vendor:** SGHE-ELLUCIAN
- **Function Area:** STUDENT_SS
- **Request Date:**
- **Delivered Date:** 30-Nov-2015
- **Promise Date:**
- **Activity Date:** 30-Nov-2015

### OBJECT DATA

<table>
<thead>
<tr>
<th>OBJECT</th>
<th>TYPE</th>
<th>INCLUDED</th>
<th>STATUS</th>
<th>CMG</th>
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<tbody>
<tr>
<td>BWOKCTL1</td>
<td>PACKAGE</td>
<td>T</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>BWOKGEN1</td>
<td>PACKAGE</td>
<td>T</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>BWOKGEN5</td>
<td>PACKAGE</td>
<td>T</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>BWOKGSTD</td>
<td>PACKAGE</td>
<td>T</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>BWOKSH1</td>
<td>PACKAGE</td>
<td>T</td>
<td>M</td>
<td></td>
</tr>
</tbody>
</table>

### XREF DATA
- **Related PMU ID:**
- **Defect ID:**
- **Contact ID:**
- **RPE ID:**
- **Other:**

[Collusion Report]
# Collision Report

## Collision Report for PCR-000134142_BWS8070102

### MOD Collision(s)

<table>
<thead>
<tr>
<th>ID</th>
<th>Object Name</th>
<th>Object Type</th>
<th>Title</th>
<th>Object Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>UT_30063_BWS80701</td>
<td>BWSKALO1</td>
<td>PACKAGE</td>
<td>Banner Student Self-Service Mod for Change PIN to Password</td>
<td>P</td>
</tr>
<tr>
<td>UT_30109_BWS80800102</td>
<td>BVKCSCHD</td>
<td>PACKAGE</td>
<td>Banner Student Self-Service Local Mod for Class Search performance enhancements</td>
<td>P</td>
</tr>
<tr>
<td>UT_30109_BWS8070102</td>
<td>BVKCSCH1</td>
<td>PACKAGE</td>
<td>Banner Student Self-Service Admissions and Registration Fixes (Class searching perf enhancements)</td>
<td>T</td>
</tr>
<tr>
<td>UT_30109_BWS8070102</td>
<td>BVKCSCHD</td>
<td>PACKAGE</td>
<td>Banner Student Self-Service Admissions and Registration Fixes (Class searching perf enhancements)</td>
<td>T</td>
</tr>
<tr>
<td>UT_30109_BWS8070102</td>
<td>BVKCSCHL</td>
<td>PACKAGE</td>
<td>Banner Student Self-Service Admissions and Registration Fixes (Class searching perf enhancements)</td>
<td>T</td>
</tr>
<tr>
<td>UT_9121_BWS80701</td>
<td>BWSKGEN1</td>
<td>PACKAGE</td>
<td>Banner Student Self-Service Local Mod for Class Roster</td>
<td>P</td>
</tr>
<tr>
<td>UT_9121_BWS80701</td>
<td>BWSKGEN1</td>
<td>PACKAGE</td>
<td>Banner Student Self-Service Local Mod for Class Roster</td>
<td>T</td>
</tr>
<tr>
<td>UT_9121_BWS80701</td>
<td>BWSKGEN1</td>
<td>PACKAGE</td>
<td>Student Self-Service Program Selection Mod</td>
<td>T</td>
</tr>
</tbody>
</table>

## PATCH Collision(s)

<table>
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<tr>
<th>ID</th>
<th>Object Name</th>
<th>Object Type</th>
<th>Title</th>
<th>Object Status</th>
</tr>
</thead>
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<tr>
<td>PCR-000132090_BWS8070101</td>
<td>BWSKALO1</td>
<td>PACKAGE</td>
<td>Banner Student Self-Service 8.7.1.1</td>
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</tbody>
</table>

## UPGRADE Collision(s)

<table>
<thead>
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<th>ID</th>
<th>Object Name</th>
<th>Object Type</th>
<th>Title</th>
<th>Object Status</th>
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<tr>
<td>BWS8070100U</td>
<td>BVKCSCHT</td>
<td>PACKAGE</td>
<td>Banner Faculty Advisor Self-Service 8.1 Upgrade</td>
<td>P</td>
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<tr>
<td>BWS8070100U</td>
<td>BVKCSCHS</td>
<td>PACKAGE</td>
<td>Banner Faculty Advisor 8.6 Upgrade</td>
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<td>BWS8070100U</td>
<td>BVKCSCH1</td>
<td>PACKAGE</td>
<td>Banner Faculty Advisor 8.7.1 Upgrade</td>
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</tr>
<tr>
<td>BWS8070100U</td>
<td>BVKCSCH1</td>
<td>PACKAGE</td>
<td>Banner Faculty Advisor 8.7.1 Upgrade</td>
<td>P</td>
</tr>
<tr>
<td>BWS8070100U</td>
<td>BWSKFLS</td>
<td>PACKAGE</td>
<td>Banner Student Self-Service 8.6 Upgrade</td>
<td>P</td>
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</tbody>
</table>

Total Collision Count: 21
## Impacted Mods Spreadsheet

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Priority</th>
<th>Title</th>
<th>Object</th>
<th>Object Type</th>
<th>Obj Status</th>
<th>Mod Collision ID</th>
<th>Developer</th>
<th>Dev Complete</th>
<th>Install</th>
<th>DR 1</th>
<th>DR 2</th>
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</thead>
<tbody>
<tr>
<td>Finance</td>
<td></td>
<td>UI_9010 - Finance Mod for GOQRPLS.PLL</td>
<td>GOQRPLS</td>
<td>FORM</td>
<td>T</td>
<td>gen08000u</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td></td>
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<td>GOQRPLS</td>
<td>FORM</td>
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<td>n/a</td>
<td>n/a</td>
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<tr>
<td>Finance</td>
<td></td>
<td>Mod 64 - Banner Finance 8.7 Delivery of Mod 64</td>
<td>FGKABA1</td>
<td>PACKAGE</td>
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<td>fin1001u</td>
<td>Anu</td>
<td>12/11/2015</td>
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<td>General</td>
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<td>UI_9006 - Banner WEB Governor Mod For Banner 8.7</td>
<td>TWB101DG1</td>
<td>PACKAGE</td>
<td>P</td>
<td>twb10008u</td>
<td>Larry</td>
<td>12/10/2015</td>
<td>12/16/2015</td>
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<tr>
<td>General</td>
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<td>UI_9030 - Banner General Jobsub Mod for Evisions Integration</td>
<td>GAJOBS5</td>
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<td>P</td>
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<td>Susan Li</td>
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<td>UI_9040 - Self-service authentication mod</td>
<td>UI_CHANGE_PASS00</td>
<td>PACKAGE</td>
<td>P</td>
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<td>Brian</td>
<td>12/10/2015</td>
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<tr>
<td>General</td>
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<td>UI_9043 - Banner Web Tailor Local Mod for TWB1WEB1</td>
<td>TWB1WEB1</td>
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<td>12/16/2015</td>
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<td>UI_9044 - Local Mod for SEEDS</td>
<td>BATCHSECURITY</td>
<td>SCRIPT</td>
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<td>Larry</td>
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<td>GOQOUB</td>
<td>FORM</td>
<td>T</td>
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<td>Larry</td>
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<td>chn - 12/18</td>
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<td>UI_9051 - Axiom Related Objects</td>
<td>GOXB_COMMON0</td>
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<td>Larry</td>
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<td>UI_9073 - Banner General Mod for sbanicons.jar</td>
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The New World of XE
Issues & Impacts on Project Management
Banner XE Timeline

June 2012
DBEU

November 2012
Catalog/Schedule 9.1

September 2014
Faculty Grade Entry 9.2

May 2015
Advising Profile 9.0
Events Mgmt 9.3

October 2015
Registration 9.2
Advising Profile 9.1
Student API 9.1.1
Catalog/Schedule 9.3
Student Overall 9.3

April 2016
Registration 9.3
Advising Profile 9.2
Fac Grade Entry 9.4.2
Student Overall 9.4
Student API 9.4
Academic History 9.1
Catalog/Schedule 9.4
Student SSB 9.2
Banner XE timeline
Challenges

• Space
• Unexpected Dependencies
• Changing Release Dates
• Modifications
• Steep Learning Curve
• Additional Vulnerability & Accessibility Testing Required
Space - Issues

- **Banner 8**
  - Able to support additional development/test environments with minimal impact to middleware resources
  - Simple matter of making a static copy of the Banner forms binaries & added configuration on the self-service side

- **XE**
  - Each additional dev/test environment essentially duplicates the middleware resources needed
  - Quickly start to consume large amounts of memory at the middleware level
Space – Project Management Impacts

• Delays in being able to install & deploy XE modules

• Not enough space to have XE modules deployed to all test environments
  
  ○ Have to “unplug” from BANDR1 to hook up to BANDR2
Unexpected Dependencies - Issues

• Assumption was that XE modules would have fewer dependencies

• We’ve been surprised by dependencies on other functional areas

Class Schedule 9.4

Finance module of DB upgrade

Finance 8.10.1
Unexpected Dependencies – PM Impacts

• Last Minute Coordination
  o Additional Installs
  o Impact on Mods

• Getting Everyone On Board
Changing Release Dates - Issues

- Original Planning Includes Expected Releases
  - Dress Rehearsals Planned Around Release Dates
- Counting on Fixes Coming in Expected Releases
- Events Management 9.4: December 2015  Late Q1 2016
- Student Advising Profile 9.3: December 2015  February 2016  ??
- Registration 9.4: January 2016  February 2016  ??
Changing Release Dates – PM Impacts

• **Plans Keep Changing**
  
  o Requires plan B, C, D,....

• **Have had to pull already installed releases**
  
  o This can impact mods

• **Start planning the NEXT upgrade project while still working on the current one**
Modifications – Impacts

• Everything Changes!

• XE Doesn’t Deliver Individual Objects Like 8.x
  o We no longer have an automated way of knowing which mods need to be updated

• Manual Analysis of Each Mod is Now Required
Modifications – Impacts Continued

• New Types of Mods to Keep Track Of
  o Configuration Files
  o Extensions
Steep Learning Curve - Issues

• Everyone Has New Things to Learn
  o Developers, Installers, Analysts, End Users

• Forced to Learn a New Platform, Perform New Tasks as a Result, In Addition to Performing Normal Upgrade Activities

• New ‘First Line of Defense’ Troubleshooting
  o Clearing Cache, Checking Browser & Version, etc.
Steep Learning Curve – Impacts

• Timeline
  o How are we going to get everything done?

• Chaos
  o New fires are being put out daily
  o People want answers as to why things aren’t working, but the ones investigating are spread incredibly thin
Performance, Vulnerability & Accessibility Testing - Issues

- New Modules Required Testing
- Waiting on New Releases to be Delivered & Mods to be Addressed Before Testing Could Begin
- QA Needed Training on New Modules & New Test Scripts Were Needed
Performance, Vulnerability & Accessibility Testing – PM Impacts

• **Timeline**
  • Additional testing required extra time

• **Resources**
  • Additional QA resources were needed

• **Coordination & Scheduling**
  • What modules are ready for testing?
  • Does everyone have everything they need?
Issues We Still Face
• **Approach to XE is an evolving process**
  
  • Each new module presents new challenges
  
  • Still working through our internal processes, such as mod tracking

• **Struggle to prioritize testing**
  
  • Which apps should get the most focus?
  
  • The resource intensive ‘new kid’ XE is taking the focus and resources away from 8.x testing
• XE presents new challenges which require changes to how we plan & execute upgrade projects

• Major impacts include:
  o Accounting for increased space requirements
  o Unexpected dependencies on other modules
  o Expected release dates can be moving targets
  o Change to how we handle mods
  o Steep learning curve for all involved
Other University of Illinois XE Presentations

36090 - Navigating the Banner XE Architecture
   Tuesday 11:30 – 12:30

38493 - Overcoming the Challenges of XE Upgrades at the University of Illinois
   Wednesday 10:00 – 11:00

37490 - Lessons Learned: Implementation of XE Student Modules
   Wednesday 11:15 – 12:15
Thank you!

Robyn Velazquez
robynv@uillinois.edu
Beth McCarter
emason@uillinois.edu

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Session ID xxxx
We need your help

Feedback Survey

Access session surveys by using the survey widget on the mobile app or by logging into your session schedule builder at

http://tinyurl.com/elive2016surveys

Robyn Velazquez
Beth McCarter

Session ID 39932