

Beta Testing Banner 7

Sonny Monfort

Debbie S. Williamson

Jeff Stulce

Charlie Sheldon

Thomas Rose

Georgia Institute of Technology

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

- Your institution has been asked to beta test a new version of Banner. What things do you need to know to help you make a decision about whether or not you want to participate? Why would you want to be involved? How do you justify the amount of time it will take for all of the people at your institution? How does the time frame fit into the schedules of the people involved and the other needs of your institution?

Topics of Discussion

- Why would you want to be a Beta Test Site?
- How much work is involved?
- How many people would be involved?
- What are the benefits to your institution?

Organization

- Someone willing to be the lead person and direct contact for SungardSCT
- Buy-in from all groups – the testers and their supervisors
- List of all the things you will be testing
- Coordination of the testing between different campus groups

Technical Staff Support Issues

- Allocate ample technical resources (i.e. DBA, Systems Analysts) to support Beta Test
 - Time may be taken away for (or from) production issues
- Ensure technical staff up-to-speed on new software (i.e. Oracle Developer Suite 10g, Oracle Application Server (AS) 10g, etc.)

Technical Staff Support Issues

- DBA practice installation, configuration and administration of AS 10g
- DBA needs to be able to do a full, manual install

Technical Issues - Hardware

- Hardware specifically assigned for the test
 - Application
 - Database
- Production or near-production processor
- Be generous: Oracle Specifications are near minimums

Technical Issues – Software

- Ensure that technical support staff has appropriate access to:
 - Oracle Developer Suite 10g
 - Banner 7 source code
- Install SCT patches in timely manner for functional testing
 - Keep historical record of source code

Technical Issues – DBA

- Be aware of the database versions
- Base install of Banner 7 was fairly vanilla with excellent documentation
- Patches were virtually undocumented
- DBA/Analyst applying patches needs to be very familiar with details of Banner install

Testing Banner Student

- Important steps when you test
- Organization of the functional test group
- Keep an Open Mind – think of doing things a different way. Business practices may need to change.
- How we test – Admissions to Degree Awarding.

Testing Banner Student

- Local enhancements – what effort will these require. Which ones can be eliminated by new version of Banner?

Testing Banner Financial Aid

- Testing group - 1 main tester with help from others in their specialized areas for thoroughness
- Testing Procedures in FA –
 - Loading data (ISIRs, etc.)
 - New Common Matching methodology (extensive setup)
 - New and current student processing/awarding

Testing Banner Financial Aid

- Creation of new items/procedures
- Limitations
 - Inability to test with external entities (i.e. Federal government, lenders, etc.)

Lessons Learned

- Make sure all functional and technical participants have a backup. The amount of work involved or personal issues may require someone else to pick up and keep the project moving.
- Timely and redundant communication between all parties can prevent problems. Have an e-mail list just for testers.
- Changes to the start/end date can really change the dynamics of the test.

Lessons Learned (2)

- Multiple databases on same machine
- Beta testing can take away from production patches/upgrades
- Timely reporting of problems encountered to ensure SCT can evaluate and possibly resolve during the beta testing period.

Lessons Learned (3)

- When problems were encountered, providing feedback with screen shots and SQL examples greatly assisted in getting a response or resolution.
- Institutions and SCT sharing information via a listserve, regular conference calls, etc. was extremely beneficial.
 - Don't take listserv in digest format – this causes delays in receiving important information.

What We Gained from the Test

- Testing allows you to know what is coming in Banner
- Gives you a heads-up on possible business practice changes
- Allows you to influence the direction the product is heading
- Gives you advance information about the amount of work that will be required to upgrade local enhancements to Banner

What We Gained from the Test

- Advance information about how difficult upgrading will be
- For technical staff, early experience with technology changes
- Excellent on-site and virtual classroom early training

Summary

- The quality of the Banner product is important to all institutions. It is important for institutions to be willing to be involved in testing and giving feedback.
- Getting involved in design groups, panel discussions, and as a beta testing site helps SungardSCT make Banner a better product for all clients.

Summary

- SungardSCT is willing to listen to their customers. It is important for the customers to be willing to spend some time telling them what their problems/issues/needs are.

Lessons Learned During Implementation

- Query only access to Maintenance forms
- Run Batch creation of Curriculum Records
- Cannot change curriculum records on SGASTDN
- Campus does not default when curriculum is duplicated

More Lessons Learned During Implementation

- New forms require grants to users who need them
- Can hide SSN but not mask it (SPAIDEN, SPAPERS)
- New items in self-service. You may not want to activate all.
- Upgrading Imaging

Common Matching

- Part of SungardSCT's multiple PIDM Prevention
- Used both in batch data load processes and online forms
- Optional for online – enabled in GUAINST for 'everyone'.
- However, can exempt individual users.

Common Matching

- Mandatory for batch processes.
- More details – see handout.

Questions & Answers

Thank You!

Presenter(s) Sonny Monfort

Charlie Sheldon

Debbie Williamson

Jeff Stulce

Thomas Rose

e-Mail sonny.monfort@oit.gatech.edu