Reminders

- Please place your phone on mute
- Do not place your phone on hold
- Submit questions via WebEx Chat
  - Questions can also be submitted to managedservices@usg.edu if it is specific to an institution
- Following the session, the recording will be distributed including the Question and Answer archive
Agenda

- Welcome and Introductions
  - John Scoville
- BMS Project Overview and Cohort Schedule
  - John Scoville
- Project Training and Communications
  - Ed Hauser
- Smartsheet Project Management Overview
  - Nicole Allen
- Service and Onboarding Overview
  - Hope Dunagan, Edward Townsend, Andrea Williams
- Open Q/A and Discussion
- Closing Remarks
  - John Scoville, Ed Hauser
GeorgiaBEST
USG Managed Services Strategic Initiative

John Scoville
Academic Services Governance Structure

Executive Sponsors
- Tristan Denley, executive vice chancellor for Academic Affairs and chief academic officer
- Shelley Nickel, executive vice chancellor for Strategy and Fiscal Affairs

Business Owners
- Martha Venn, deputy vice chancellor for Academic Affairs
- Bobby Laurine, vice chancellor and chief information officer

Advisors
- Joyce Jones, vice chancellor for Student Affairs
- Rich Loftus, associate vice chancellor for Student Enrollment Services
- Tracy Ireland, associate vice chancellor for Student Enrollment Services
- Charles Sutlive, vice chancellor for Communications and Governmental Affairs
- Jason Matt, executive budget director
Academic Services Governance Structure

Academic Services Governance

Executive Director
John Scoville

Project Management Team
Karen Nunn
Ed Hauser
Nicole Allen
Andrea Williams

Service Management
Hope Dunagan

Infrastructure
Michael Bracewell

Change Management
Teresa Piazza
Comm/Training

Databases
Ed Townsend

Systems
Mark Plaksin

Institutional Project Team
Past
• Selected as standard in 1994
• ITS begins offering Banner Managed Services (BMS) in 2004

Present
• 12 institutions currently utilizing BMS

Future
• Expand BMS to remaining institutions to provide students and faculty with:
  – Modernized user experience (e.g., mobile)
  – Improved performance and better integration
  – Ease of use and expanded self-service applications
  – Increased security and standardization
Benefits of USG Managed Services

- Standardized Application Security
- Consistent and timely deployments of software upgrades and enhancements
- Allows campuses to focus on strategic campus initiatives rather than upgrades and environments
- Life-cycle asset management
Phase I
• Focus on Banner Student Information Systems
  – Migration of current deployments to Managed Services
  – Cohort 1: Includes Banner 9 and CHECS deployment

Phase II
• Engage Academic Affairs to lead business process review and re-engineering
• Ancillary Products/Services
  – DegreeWorks, Banner Document Management, etc.
## USG Managed Services
### Proposed Deployment Timeline

<table>
<thead>
<tr>
<th>Current BMS</th>
<th>Cohort 1</th>
<th>Cohort 2</th>
<th>Cohort 3</th>
<th>Cohort 4</th>
<th>Cohort 5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>December 2018</td>
<td>June 2019</td>
<td>December 2019</td>
<td>June 2020</td>
<td>June 2021</td>
</tr>
<tr>
<td>Abraham Baldwin Agricultural College</td>
<td>College of Coastal Georgia</td>
<td>Clayton State University</td>
<td>Georgia Southern College</td>
<td>Georgia Highlands College</td>
<td></td>
</tr>
<tr>
<td>Albany State University</td>
<td>East Georgia State College</td>
<td>Columbus State University</td>
<td>Kennesaw State University</td>
<td>Augusta University</td>
<td></td>
</tr>
<tr>
<td>Atlanta Metropolitan State College</td>
<td>Georgia College &amp; State University</td>
<td>University of West Georgia</td>
<td>University of North Georgia</td>
<td>Georgia Institute of Technology</td>
<td></td>
</tr>
<tr>
<td>Dalton State College</td>
<td>Fort Valley State University</td>
<td>Valdosta State University</td>
<td></td>
<td>Georgia State University</td>
<td></td>
</tr>
<tr>
<td>Georgia Gwinnett College</td>
<td>Georgia Southern State University</td>
<td></td>
<td></td>
<td>University of Georgia</td>
<td></td>
</tr>
<tr>
<td>Georgia Southwestern State University</td>
<td>Gordon State College</td>
<td></td>
<td></td>
<td>College of Coastal Georgia</td>
<td></td>
</tr>
<tr>
<td>Middle Georgia State University</td>
<td>Savannah State University</td>
<td></td>
<td></td>
<td>East Georgia State College</td>
<td></td>
</tr>
<tr>
<td>South Georgia State College</td>
<td></td>
<td></td>
<td></td>
<td>Georgia College &amp; State University</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th># of Students</th>
<th>Cohort 1</th>
<th>Cohort 2</th>
<th>Cohort 3</th>
<th>Cohort 4</th>
<th>Cohort 5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>62,848</td>
<td>13,618</td>
<td>15,456</td>
<td>45,279</td>
<td>60,641</td>
</tr>
<tr>
<td></td>
<td>127,361</td>
<td>60,641</td>
<td>127,361</td>
<td>60,641</td>
<td>127,361</td>
</tr>
</tbody>
</table>

Total: 325,203
Questions

managedservices@usg.edu
USG Managed Services Project Communications

Ed Hauser
USG Managed Services Project Communications
Core Project Team

- John.Scoville@usg.edu (Executive Director)
- Karen.Nunn@usg.edu (Project Management)
- Ed.Hauser@usg.edu (Project Management)
- Nicole.Allen@usg.edu (Project Management)
- Hope.Dunagan@usg.edu (Service Management)
- Edward.Townsend@usg.edu (Technical Lead)
- Andrea.Williams@usg.edu (Service Management)
- Teresa.Piazza@usg.edu (Change Management)
USG Managed Services Project Communications

• Format & Timing
  – Virtual Kickoff (today)
  – Data Collection Document
  – On-campus kickoffs at each school
    • Coincides with the official July 1 USG Managed Services initiative kickoff
      – Weeks of July 9 and July 16
    • Schools to invite all necessary staff
    • Review of details for IT configuration and system testing
USG Managed Services Project Training & Communications

- Webinars as needed
- Bi-weekly cohort calls (all schools)
- Bi-weekly individual institution calls
- Monthly progress surveys – within cohort
- Monthly meeting with USG and Institution leadership
- Project planning sharing via Smartsheet
- Managed Services website to be updated
USG Managed Services Institutional Engagement

- **Engagement Manager**
  - Andrea Williams, ITS

- **Institutional Resources**
  - Project Manager
  - Functional Lead
  - Technical Lead
  - Change Management Lead

- **Purpose**
  - Liaison role between institutions and GeorgiaBEST
  - Works with institutional team to:
    - Ensure compliance with agreed to milestones
    - Resolve issues that hinder project success

- **Engagement Activities**
  - Facilitate cohort status calls
  - Provide standard tools, templates and project plans
  - Facilitate lessons learned sessions between institutions
USG Managed Services Project Teams

• ITS Project Team
• Suggested Campus Project Team
  – Project Manager
  – Technical Lead
  – Functional Lead
  – Change Management Lead
Recommended Institutional Project Team

Institutional Project Leadership Team

- Project Manager
  - Student/AR
  - Financial Aid
  - Accounts Receivable
- Functional Lead
- Technical Lead
  - Databases
  - Systems
- Change Management Lead
  - Communications
  - Training
Institutional Project Roles

Project Manager

- Overall lead for the institution
- Included in all meeting invites and communications related to BMS at the institution
- Responsible for the coordination of resources, equipment, and meeting logistics
- Responsible for facilitating completion of Data Collection Document Survey
- Responsible for information/task reporting to USG, internal campus resources and updating the BMS project schedule related to institutional tasks in Smartsheet
- Identify other institution roles where necessary:
  - System Testing
  - User Acceptance Testing
Point of contact at the institution for technical related items:
- Architecture/Infrastructure
- Local interfaces
- Networking items related to existing Banner systems and localizations/modifications made by the campus
- Authentication/Local security integration
- Security Administrator
- Provide technical information/knowledge on existing systems setup and configuration
- Identify and document customizations/localizations
Institutional Project Roles
Functional Lead

- Responsible for the coordination of business needs, business processes and flows and diagrams
- Provide historical functional information on existing systems setup and configuration
- Prioritize user and functional requirements for system testing
- Planning for user acceptance testing:
  - Make sure functions work as they do today
  - Identify and document local processes
• Point of contact for creating communications, training and other local change management activities

• Customize Change Management Toolkit for local institutions:
  – Local messages
  – User community

• Assist with the institutional training and communication at your institution
Questions

managedservices@usg.edu
Smartsheet Project Management Overview

Nicole Allen
Smartsheet

https://www.smartsheet.com/
<table>
<thead>
<tr>
<th>Task Name</th>
<th>Pred...</th>
<th>Planned Start Date</th>
<th>Planned Duration</th>
<th>% Comple</th>
<th>Estim... Completio Date</th>
<th>Actual Start Date</th>
<th>Actual End Date</th>
<th>Actual Duration</th>
<th>Owner/Lead Assigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution System Testing</td>
<td></td>
<td>08/23/18</td>
<td>21d</td>
<td></td>
<td>09/20/18</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Functional Testing of Pre-Prod Environment</td>
<td></td>
<td>08/23/18</td>
<td>21d</td>
<td></td>
<td>09/20/18</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Testing Complete for Banner 9 Admin</td>
<td></td>
<td>08/23/18</td>
<td>20d</td>
<td></td>
<td>09/19/18</td>
<td></td>
<td></td>
<td></td>
<td>Institutional PM</td>
</tr>
<tr>
<td>Testing Complete for Third Party Integrations</td>
<td></td>
<td>08/23/18</td>
<td>20d</td>
<td></td>
<td>09/19/18</td>
<td></td>
<td></td>
<td></td>
<td>Institutional PM</td>
</tr>
<tr>
<td>Testing Complete for Banner 8 Self Service</td>
<td></td>
<td>08/23/18</td>
<td>20d</td>
<td></td>
<td>09/19/18</td>
<td></td>
<td></td>
<td></td>
<td>Institutional PM</td>
</tr>
<tr>
<td>Signoff via DocuSign</td>
<td></td>
<td>09/20/18</td>
<td>1d</td>
<td></td>
<td>09/20/18</td>
<td></td>
<td></td>
<td></td>
<td>Institutional CIO</td>
</tr>
</tbody>
</table>
Download the mobile app:

- **Smartsheet for iOS**
- **Smartsheet for Android**
These resources will help familiarize you to Smartsheet:

- Information for New Collaborators
- Smartsheet Overview Video
- Smartsheet Support Resources
Questions

managedservices@usg.edu
Service and Onboarding Overview

Hope Dunagan
Edward Townsend
Andrea Williams
Service and Onboarding Overview

Service Support Team

- Team
- Communications
- Service Project Oversight
- Application Health Monitoring and Support
- Annual Reporting and Reviews
Institution Responsibilities
• Rule and Control forms in Banner
• Banner Business Processes
• First Line Technical Support
• Security

ITS Responsibilities
• System Upgrades and Patches
• Banner Releases
• Environment Monitoring
• Third Party Integrations
• IT Audit Support
Service and Onboarding Overview
Onboarding Engagement

• Data Collection Document
• Institution Project Team
• On-site visits
• Integrations
• Change Management (training & communications)
• System Testing
• User Acceptance Testing
• Production cut-over
Questions

managedservices@usg.edu
Closing Remarks and Q&A

John Scoville
Ed Hauser
Questions

managedservices@usg.edu