

Banner Upgrade Services

Client**Georgetown University**

Founded in 1789, Georgetown University is the nation's oldest Catholic and Jesuit university. It comprises four undergraduate schools, three graduate and professional schools, professional development programs and certificates, medical residencies and other programs predicated on the liberal arts tradition at the heart of the institution.



GEORGETOWN UNIVERSITY

Challenge

Cost-effectively maintain baseline customizations during Banner upgrades

Georgetown University selected Banner Student® from SunGard® to consolidate its student data processes and keep pace with changing demands. As SunGard revamps Banner in new technology to improve flexibility and interfaces, it anticipates a number of upgrades over the next few years. Having invested more than \$3 million in customizations to its Banner baseline, Georgetown sought to find the most cost-effective approach to maintaining these customizations as it moves forward with the upgrades. "In order to exploit our investment in new systems, we needed a practical methodology that would allow us to stay on a sound upgrade path while preserving our customizations," says Student Information Systems (SIS) Project Director Carrie Gillotte.

"Another urgent driver was updating both Banner General and Student modules with new financial aid regulations in time for recruiting for 2010," says Scott Campbell, Associate Registrar for the Main Campus. New financial regulations come out several times per year; while some can be updated without touching the Banner Student module, others require an upgrade.

Objectives

Georgetown's needs for the near-term and longer-term upgrade process, included:

- Complete the financial aid-related upgrades in time for 2010 admissions schedule
- Minimize burdens on Georgetown's technical and functional teams, as well as users and budgets
- For any upgrades, ensure that any changes to the Banner baseline were identified and that any necessary coding changes were made consistently and reliably
- Assist users with test plans and ensure the complete lifecycle of testing, tracking, and retesting to prepare for Quality Assurance is conducted without creating extra glitches

Discovery

When Gillotte came to Georgetown from another university and needed to find strong technical resources for support, her close contacts at two other universities were very vocal about the great relationships they had developed with IData. Gillotte then began Georgetown's relationship with IData with a dedicated resource to supplement the technical team. "Later, IData also became involved with our Banner customization needs," says Gillotte, "and they forged an even stronger relationship on preregistration and waitlist engagements."

Recognizing that Georgetown would not have the internal resources for Banner upgrades, Gillotte contacted IData to develop a methodology and take on the first upgrade. ***"Even though Banner is in production here, our internal team is still implementing a number of projects,"*** said Gillotte. ***"With the deadline driven by the financial aid changes, and being thinly staffed, it was a natural to bring IData on board for the upgrades,"*** adds Gillotte.

Solution

IData developed a complete Banner upgrade process life cycle which ensures that no item is missed through testing, and that no problems find their way into production. The process represents a combination of best practices that support Georgetown's environment and business processes.

IData created a merge script that DBAs can download and run to identify any changes between the custom code and the latest Banner release, identify what has to be reapplied, and then use tools to reapply the changes and make the system available for user testing. The result is a proven process that can be applied to any institution and, depending on their environment and workload, can significantly reduce time and effort.

Georgetown is a highly decentralized university, with a main campus, medical school and law school, as well as a School of Foreign Service in Doha, Qatar. "IData's project lead demonstrated strong leadership to ensure everyone followed the timelines," notes Gillotte. "Managing upgrades places a burden on our users, and the project lead worked very hard to engage everyone with the upgrade and even make it fun for them all to get on the same page."

According to Gillotte and Campbell, IData attributes that were keys to this successful engagement include:

- Outstanding employees with a great work ethic ("always there when we need them; can't ask for better people")
- Ability to stay on schedule
- Past working relationship
- Leadership in coordinating decentralized users
- Delivering solutions with documentation and formal handoffs to Georgetown staff

"Georgetown's CIO," says Gillotte, "has a lot of respect for IData as he feels they have been very honest and have delivered a very good product on this and prior engagements."

Results

Everyone involved has been very pleased with the outcome. "What IData delivered was very good for use in practice," says Gillotte. "The methodology and tools enable us to work on upgrades ourselves vs. asking SunGard to deal with customizations." The solution also minimizes burdens for Georgetown's technical team and end users, and saves money by reducing the need for services from the software vendor.

The most significant benefits for the University include:

- The ability to keep on schedule without adding workload to the current development team
- Maximizing end-user participation by setting clear expectations, easing the burden of their participation
- Seamless user transition with no interruption in processing
- Repeatable process for future upgrades (Georgetown is beginning another upgrade of Banner Student, working the upgrade themselves, with IData standing by as needed).

IData Incorporated

IData is a higher education technology consulting and software solutions firm. For information on innovative services from IData, visit www.idatainc.com. If you would like to talk with IData about Banner upgrade services, contact:

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