UNM IT Engagement Process for Banner 9

Step 1. Begin working Together

> **Description:** In this step, UNM IT will work with you to determine who key stakeholders are-- individuals, departments or organizations whose day-to-day operations will be impacted by Banner 9. Those stakeholders might play a role in:
> - Planning Meetings: Where timelines, needed resources and priorities are established.
> - Steering Meetings: Where decisions are made and barriers are eliminated.
> - Scrum Meetings: Day-to-day meetings in which progress is reported and tracked.
>
> UNM IT will also work with you to determine an optimum implementation date for your department--one that does not occur within a peak business cycle.
>
> **Output**: The key outputs during this step are:
> - engagement with the appropriate resources—from decision-makers to workers who will use Banner 9 to perform their daily tasks and
> - a high-level roadmap detailing when Banner 9 will be implemented in your functional area.

Note: For new Banner modules, stakeholders will be identified based on usage.

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Step 2. Document Our Approach

> **Description**: A project charter is a critical component of the project management initiation and planning phases. The charter lays the foundation of the project
>
> **Output**: The key outputs during this step are:
> - resources required to participate in planning process
> - roles and responsibilities
> - timelines
> - funding sources
> - project approval authorities and governance

Note: For new Banner modules, this step does not apply.

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Step 3. Map Out and Assign Tasks

> **Description:** A project plan is a formal, approved document used to manage and control project execution.
>
> **Output**: The key outputs during this step are:
> - guidance on project time, cost, scope, resources, risk and other controls
> - baseline expectations on which project performance is measured
> - expectation for communication with project sponsors, champions, stakeholders and team
> - authorization for project manager to assemble project team and start the project

Note: For new Banner modules, an abbreviated project plan will be created.

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Step 4. Understand Your Job(s)

> **Description:** Current and future state business processes show how activities flow from beginning to end. This helps your department reduce efficiencies, drive down costs and be more responsive.
>
> **Output**: The key outputs during this step are documentation of:
> - current ("as is") and future ("to be") business process states
> - dependencies—business processes which rely on automated "jobs" to run
> - Appworx (automated "job" scheduling software) processes

Note: For new Banner modules, only new features and functionalities will be documented.

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Step 5. Document How To Use Banner

> **Description**: A use case is a written description of how users will perform tasks on Banner 9.
>
> **Output**: The key outputs during this step are:
> - documented use cases representing the actions users will take to accomplish a task
> - user acceptance test scripts
> - user testing

Note: New features and functionalities will be developed into use cases for test development.

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Step 6. Reach Out and Touch… Banner 9

Description: Before Banner 9 is released to production, UNM IT must ensure it works as intended and will give you an opportunity to test it thoroughly to ensure it meets your needs.

Output: The key outputs during this step are:
- user access to a "sandbox" environment in which you can test Banner 9 functionality
- deployment of the module on development (BAN D), integration (BAN I) and production (BAN P) environments in which extensive testing will be done
- a security assessment to ensure information security is not compromised when you use Banner 9
- load testing to ensure a high volume of users can use Banner 9 concurrently with no performance degradation
- security and Banner Authorization Requests (BAR) are set up.

Note: For new Banner 9 modules, this step will be the same.

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Step 7. Develop Training and Support Material

Description: Before we "go live" with Banner 9, UNM IT must plan for the day-to-day operational support for such functions as access, configuration and maintenance, service stability, etc.

Output: The key outputs during this step are:
- Articles on FastInfo, UNM IT's knowledge system which allows you to search for answers to questions you may have about Banner 9 issues.
- Updated training materials created by functional experts to help you navigate through the Banner 9 modules and functions you use daily
- Updated Standard Operating Procedures (SOPs) which provide step-by-step instructions to help you perform routine Banner 9 operations.

Note: For new Banner 9 modules, this step will be the same.

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Step 8. You're Up and Running

Description: Going live—launching your Banner 9 module into production—is the culmination of all our planning and hard work. You will now get to use Banner 9's enhanced functions to perform your daily tasks more efficiently.

Output: The key outputs during this step are:

- Project Acceptance and Sign-Off – signed confirmation from the functional sponsor that the project has achieved its documented objectives and has been formally accepted on behalf of all customer users.
- A "warranty period" during which the Banner 9 project team will continue to support any issues which may occur.

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Note: For new Banner 9 modules, this step will be the same.
Step 9. Begin Your Lifetime Warranty

Description: UNM IT has a structured support model which ensures Banner 9 operates with no disruption. Should issues arise, the support model includes a method by which you can report any incidents to which we will respond.

Output: The key outputs during this step are:
- An inventory of support documents which are transitioned to Operations.
- Review of the operational support plan with functional stakeholders
- Finalized warranty period specifications with agreement on sign-off criteria.

Note: For new Banner 9 modules, this step will be the same.

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Graphic Representation of UNM IT Banner 9 Engagement Process