



Taking the next step

Sam Houston State University gains flexibility and an improved user experience by upgrading to Banner 9 by Ellucian

Looking to enhance the user experience

Sam Houston State University (SHSU), one of the oldest higher education institutions in Texas, is located just north of Houston in Huntsville, Texas. SHSU serves approximately 20,000 students with nationally recognized programs, and also offers extensive online Bachelor and Master's degree programs.

SHSU implemented Banner® by Ellucian in 2010, and was pleased with how the system was performing. When Ellucian launched Release 9 for Banner, the

university became intrigued by the updated and intuitive user interface as well some of the features and functionality of the new modules and applications. SHSU viewed Release 9 as a powerful tool with the potential to address some issues on campus, and improve the user experience for faculty, staff, and students.

Most notably, the university hoped to enhance the Banner experience for users on mobile devices. "Students and employees struggled with the Self-Service interface including the inability to use it on a mobile device," says Jacob Chandler, associate vice president of IT



Sam Houston State University

About Sam Houston State University

Enrollment

- 20,000

Objective

- Modernize to a flexible, intuitive ERP that will work across multiple devices

Solution

- Banner® by Ellucian (Release 9)

Business benefits

- Better user experience across campus
- More flexibility for students and staff

IT improvements

- Easier upgrades and maintenance
- Higher efficiencies

enterprise services at Sam Houston State University. “It was possible to use it; however, it was not designed for use on such a small screen.

“The other notable issue we have had over the last few years is with regard to managing client-based Java on our workstations,” says Chandler. “More popular browsers are disabling support for Java-based applications in their browsers. With Banner (Release 9), we were excited to be able to move away from INB using Oracle-Forms and toward the Transformation modules.”

Making the move to Banner (Release 9)

SHSU began formulating its rollout strategy for Release 9 in 2015. The university already had a solid foundation in place: not only was its IT department adept at implementing standard Banner upgrades quickly and easily, it also laid the groundwork for a smooth transition to Release 9 via a coordinated campus-wide effort. “We have been able to communicate the planned timing of these upgrades to our functional areas over the last 6-9 months, so that those areas remained aware of the impending release of these modules,” says Chandler. “By the time the modules were released, our campus was ready to begin testing and confirming milestones in the rollout plan. We have also been very open and communicative with our functional users about the upgrade process. All of these attribute to our ability to stay current which enabled us to be able to move forward with Release 9 transformation in these areas.”

The transition was also made easier through SHSU’s comprehensive and strategic approach. “Change is a challenge for anyone and any organization,” says Chandler. “SHSU mitigates the resistance to change by conducting a monthly meeting of associate vice presidents and directors that oversee various functional and technical aspects of the ERP system. This meeting provides a forum for campus leaders to discuss and coordinate issues and opportunities related to the successful use of the ERP system. This open dialogue establishes a culture of communication, collaboration, and trust. We have used this meeting time to educate our leaders on the tenets of Ellucian’s

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overall strategy, provide demos of features, and discuss SHSU’s timeline for implementation.”

SHSU has been steadily adding users to the new release as the rollout has progressed, with the goal of completing the implementation of Release 9 for Banner® Human Resources, Banner® Finance, and Banner® General by the fall of 2016. The university plans to run Release 9 in parallel with its Banner ERP until early 2017, when all of its campus users should be familiar with Release 9 and using it regularly.

Banner (Release 9) will provide SHSU and its constituents with a more dynamic experience. “Release 9 will give us more flexibility in how we deploy the system across multiple devices,” says Chandler. “As we have moved into the flexibility of Release 9, we have been able to open up access to other people and to on-campus wireless locations.” Users who may have not been able to enjoy the

full functionality of Banner—because of technical limitations stemming from where and how they were accessing it—can now fully utilize more functions and features, regardless of what browser or device they use. “Someone can be in a meeting, get a notice on his or her phone or tablet, and take care of requests or other business because of the additional features and flexibility of Banner (Release 9),” says Chandler.

A seamless transition... and rave reviews

The implementation of Banner (Release 9) proceeded smoothly, with little to no difficulty. The IT team initially began by installing it in a “sandbox environment.” “This environment allows us to understand how the new software will work, and helps us to plan our deployment and roll out of the software as well as identify any issues ahead of time before including functional users,” says Chandler. “It was during this time that we found that incorporating Release 9 for Banner Human Resources, Banner Finance, and Banner General Administration together was not going to be as big of a change as we thought from a tech perspective. Once we realized this, we brought in functional users, and they really helped advocate for it and support this next phase for us.”

Once SHSU campus users were able to access Banner (Release 9), the rollout proceeded at a rapid pace. “One of the things we tried to do with this rollout was treat it like a normal Banner 8 upgrade,” says Chandler. “We staffed the same both from a technical and functional level to support an upgrade and never really saw an increase in tickets or phone calls. The key was communication and preparation. Our functional areas had trained the staff ahead of time, our ERP committee was aware of this upgrade occurring. We still had a fully functional Banner 8 INB environment for fallback, but it wasn’t really needed.”

So far, the feedback from campus users has been overwhelmingly positive. The updated user interfaces, for example, have garnered glowing reviews, and the similarity with the layout of the previous Banner system has helped mitigate any potential problems for most users. “All of the screens are laid out in similar way, they are just fresher,” says Chandler. “Everything isn’t moved around. It’s the screens you are used to that allow our campus to keep operating—but they essentially got a fresh coat of paint. SHSU students, faculty, and staff have all expressed how much they like the updated interfaces.”



Built on trust

Chandler says that SHSU's relationship with Ellucian was instrumental to a smooth rollout of Banner (Release 9). And because Ellucian specializes in higher education, that relationship is built on trust and shared commitments. "With Ellucian, we feel that it's more of a partnership versus a vendor/client relationship," he says. "And the way Ellucian structures its relationship with clients mirrors a higher education environment: there's a sense of 'shared governance,' which institutions value.

"Campuses want to be involved in decision making," he says. "With all of the consortiums, advisory boards, Beta groups, webinars—working with Ellucian is more collaborative than it's ever been. It's good to feel valued by your vendor, and to have a bit of say in the direction of where we are going and what we are using."

And what advice does Chandler have for other institutions considering the transition to Banner (Release 9)? "It's not as scary as it seems," he says. "It's a new technology and environment, but Ellucian and our fellow institutions are there for support."

Chandler also notes that Release 9 is next-generation technology, and in the long run, its flexibility and dependability will help any institution promote student success and better efficiencies across campus. "You need Release 9 to provide better services to your campus," says Chandler. "There's a natural human tendency to fear the unknown. But just jump in and try it. Sure, our campus felt some uncertainty at first, but once we got started we realized that it wasn't as difficult as we were expecting. For any institution, I'd say: You've got this."



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