

Basic Banner Support Strategy

The purpose of this document is to describe the centralized service strategy for supporting Banner applications for WVNET member schools. It is assumed that the WVNET responsibilities outlined here are available to all institutions, and are part of the centralized costs for supporting Banner products. Some institutions will have separate service agreements for functions identified below as campus functions; in these cases, such responsibilities will be clearly identified in the service agreement.

WVNET's Role and Responsibilities

General Support:

- WVNET will maintain, on equipment at WVNET, Banner Student, Financial Aid, and Finance systems and associated software (Oracle, compilers, etc) for Open VMS, AIX, Linux, and Windows server operating environments. Included with these systems are the Banner modules for which every institution is licensed. Support for additional Banner systems (Human Resources, IVR, Self Service products, etc) are not included in this agreement unless those products are in use by 75% of the campuses. These Banner instances will be maintained for the purpose of verifying SCT's installation procedures before making it available for downloading by member institutions, for testing upgrades and enhancements of the software by WVNET staff, for problem resolution by WVNET staff, and for training purposes.
- WVNET will communicate news concerning Banner and Oracle support to our users via listserv lists. All interested parties involved in using, supporting, or administering Banner products within the WVNET community are encouraged to subscribe and participate in the appropriate listserv.
- WVNET will be the primary contact with SCT and Oracle support for problem resolution and software defect support for the centrally contracted software components, as agreed contractually with these vendors.
- WVNET will work with technical and functional users at the institutions to develop, locate, or facilitate commonly needed reports, procedures, software, or other assistance or resources that can be shared to the mutual advantage to the members. Resources developed and identified as common to all members will be supported by WVNET.
- WVNET will maintain and make use of a problem tracking and change management system in order to enhance support for the members. Procedures for use of the problem management system are documented elsewhere.
- WVNET will make every reasonable effort to stay abreast of current developments and trends in the hardware and software industries that may affect the members and keep the institutions informed of those changes.
- In the event that these basic services are not adequate for an affiliate school's needs, additional support can be arranged and contracted either temporarily or long term upon mutual agreement.
- WVNET will make available technical notes, documentation, and other information provided by SCT on product usage and support. This information will be available on a secured web page.(<http://www.wvnet.edu/banner>) Alternative delivery methods (diskette, CD, or hardcopy) may be available on request; however, WVNET

encourages users to use the web page for the most up-to-date information and cost-effective method of access.

Operational and DBA Support:

- WVNET will perform installs and upgrades for Banner Student, Financial Aid and Finance systems and associated software (Oracle, compilers, etc.) on WVNET equipment for OpenVMS, AIX, Linux, and Windows operating environments.
- WVNET will assist campus technical support staff with upgrades on their system by providing verified and corrected installation instructions, software, and installation scripts or com files, and by being available during upgrades to answer questions and help solve problems. WVNET will not perform the actual installation process unless separately contracted to do so (subject to staff availability and additional cost). Arrangements for installation support must be made at least 2 weeks in advance.
- WVNET will support Oracle Forms for the above components in the same manner.
- WVNET will not support modifications to the vendor distributed baseline software. Exceptions to this are the Finance Interfaces and any related code agreed to be maintained by WVNET on a temporary or permanent basis. Support of custom code is limited to changes needed to support State processes or that have been accepted for general use by all schools. Institutional specific customizations will not be supported.
- WVNET will maintain the current version and one version back of the *vendor-supported* software. Maintenance of the previous version will cease when no WVNET member is running that version or when the product is no longer supported by the vendor. In the event that a member is still running an unsupported version, WVNET will keep the version on the system only as long as space is not required for newer supported software. However, WVNET support will be limited to determination of whether a problem existed in the distributed package as time allows; no corrections for unsupported vendor software will be available. Members are strongly encouraged to maintain current software to keep support costs down and in fairness to the other members may apply.

Application and Functional Support:

Administrative Applications supports the following Banner modules: General; Student; Alumni; Financial Aid; Accounts Receivable; Self-Service Student; Self-Service Faculty, and Finance. The Finance interfaces are also supported and at this time include the Invoice, Manual Warrant, Payroll, and PCard interfaces. Application and Functional support will occur in three major areas: Support, Consulting, and Training. Services include:

- Support
 - Unlimited telephone support for troubleshooting problems / issues in the Banner baseline software in the above listed modules. Support of custom code is limited to changes needed to support State processes or that have been accepted for general use by a statewide oversight group. Institutional specific customizations will not be supported. The Finance Interfaces are

an example of supported custom code. (Problems can be reported through the WVNET Problem Reporting Web Site <http://www.wvnet.edu/oz>. Problems can also be reported by telephone to the WVNET Help Desk or to the appropriate Administrative Applications Software Specialist. All Problems, regardless of reporting method, will be logged in the WVNET Problem reporting system for tracking purposes.

- Unlimited number of site visits to resolve problems / issues in any of the above listed Banner Modules. (Site visits for problem resolution will only be made if solution can not be made remotely. For example, if access to client's database is not available remotely or if attempts to resolve the issue remotely have failed. If the institutional database is not accessible remotely because of client security policy, travel and living expenses for WVNET staff may be billable to the institution.)
- Problems / issues that can not be solved by the WVNET Administrative Applications Software Specialist will be reported to the SCT Actionline for resolution. The WVNET Administrative Applications Software Specialist will report the status of the SCT contact regularly to the reporter of the problem.
- Administrative Applications will provide documentation on Banner upgrades and assistance in reviewing and implementing enhancements and improvements contained in the upgrades. Documentation will be posted on the Banner Support Web site.
- Unlimited functional support of the Banner Finance interfaces to include general instruction on use, troubleshooting services, and upgrade changes and issues.
- Consulting
 - Unlimited consulting support on the use and maintenance of the baseline Banner software in the above listed modules. Support of custom code is limited to changes needed to support State processes or that have been accepted for general use by a statewide oversight group. Institutional specific customizations will not be supported. The Finance Interfaces are an example of supported custom code.
 - Administrative Applications will provide on request process analysis and gap analysis studies involving the above listed Banner Modules.
 - Administrative Applications will also provide implementation services for parts of the above listed modules not currently in use at the institutions. (Implementation of new software is subject to additional charge.)
 - Administrative Applications will assist with ad hoc reporting requests if resources with necessary skills are available.
- Training
 - Administrative Applications will provide basic user training on the above listed Banner Modules.

- Administrative Applications will provide training on Banner upgrades and new releases. In depth technical training may be arranged with an outside vendor for a fee.
- Administrative Applications will provide training on the use of the Banner Finance interfaces. This training will generally be one-on-one with the campus staff responsible for running the interfaces.
- Lead time for new training sessions varies based topic and staff availability.

Member Institutions Roles and Responsibilities

- Member institutions will provide systems programming and operations support for the operating environment on which their Banner systems run, unless a separate contract has been established for WVNET to provide such support.
- Members are responsible for distributing user and process notes to the appropriate local staff.
- Member functional and technical support staff should provide the primary support for their local users on the Banner products.
- Member staff will report problems to WVNET's Help Desk at (800) 253-1558. The helpdesk will log all calls for support and keep records of results. Members can also log problems via the web at: <http://www.wvnet.edu/oz>
- Members will be responsible for establishing operating system and Oracle accounts and security, including role and form level security.
- Any modifications to the Banner software and any reports or interfaces produced locally by members will be the member institution's sole responsibility. Members should be aware that deviations from vendor supplied code and procedures make necessary upgrades to vendor software extremely difficult, and can result in loss of data.
- Members will provide, install, and support Forms servers and necessary network connections and SQL*Net unless contracted separately with WVNET. Member technical support staff will generate the Forms for their campus unless separately contracted with WVNET.
- Members will provide, install, and support the web server platforms and software needed to support the Banner Web products. Some Banner and Oracle Web components are not centrally contracted by WVNET with SCT at this time. WVNET Purchasing can provide details on current license information, and can, at the institution's request, arrange for such purchases to be billed back to the institution.
- Members will notify WVNET at least one month prior to Banner upgrade schedules to ensure that WVNET staff coverage can be arranged.
- Technical staff at member institutions will maintain current skills to be able to perform the responsibilities outlined in this document. Members are encouraged to attend SCT conferences, user group meetings, and Banner-related training offered by WVNET in order to stay current.