

jack henry™

# **Banno Business™**

## **Implementation Guide**

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## Let's get down to business

**We're here to help make this as easy as possible.**

For customers installing Banno Business who are already live on the Banno Digital Platform (Retail) you can expect a short, low-lift implementation. The standard timeline is just 6 weeks, with 4 of those weeks focused on Acceptance Testing and preparing for whichever launch approach you've decided is the right path for your institution. If you were involved in the retail install, you know that project was a lot of work! For Business, we just need a handful of onboarding items executed and then we'll get everything set up.

# What to Expect

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At a high-level, here are the Implementation Phases that will be discussed on the initial kick-off call with the financial institution:

## 01 Onboarding

- Provide online banking IDs for accounts you'd like as testers so we can configure business features
- Review documentation

## 02 Implementation

- Participate in Banno Business training
- Business Implementation Coordinator configures business features
- Seeding of the financial institution's testers
- Perform internal testing

## 03 Acceptance testing

- Implementation Coordinator will share an acceptance testing checklist in Basecamp, along with details outlining the acceptance testing phase and the process of tracking issues in Trello.
- Identify any updates to configs that require resolution prior to go live
- Provide final launch approval
- Prepare for going live

## 04 Launch

You'll have two launch options to choose from, depending on your rollout strategy:

### Mass Launch

At the time of your Banno Business go live, we must "seed" all of your Cash Management (CM) users. This allows us to populate data in new databases/tables for business features to work properly for your business users to appear in Banno People so you can manage their Permissions even if they haven't logged into Banno before.

To mass enable Banno Business features for your business users, we will pull an entitlements export from NetTeller. Then, we will upload that export in Banno. Once the upload is completed, the next time the user logs into Banno they will see Banno Business features. At that point, you're live!

**Soft Launch**

Some customers have stated they'd like to slowly soft launch by adding customers manually as they see fit, and this is possible. Since Banno and NetTeller can both be live at the same time – and because the CM SSO can still be in place if you'd like, you can slowly roll things out. If you do opt to soft launch, at the end of your four weeks of Acceptance Testing, we will seed all your business users. We will not upload the entitlement exports mentioned in the “Mass go live” section, and then you will then be able to manually enable business features via Banno People for your business users as you see fit.. You will also have the ability to create new business and have them begin their online banking experience in Banno Business.

We know that change is hard for any user, and can be especially hard for both the financial institution and their CM users - so we see this slow roll as a really great opportunity for the bank to ease important customers into a new experience. This slow launch can help prevent the frustration that customers sometimes feel when we “take away” their current experience and replace it with something new, as it allows them the choice to execute business actions in Banno, or to continue to execute them in NetTeller. It also provides them the opportunity to jump right into the modern experience if they're a user who likes to try the new and improved. As we continue to release business features, we'll continue to enable them for your financial institution and allow your customers to continue to build their experience in Banno until you inform us you'd like the CM SSO removed.