

Banner XE Experience

Mississippi BUG September 16, 2013

Presented by: Ed Hauser

Director for Enrollment & Student Services

Agenda Slide

- Banner Update
- Ellucian XE
- Banner XE & Roadmap
- XE Applications Available Today
- XE Development Partners
- XE Applications in Process
- Q & A

Roadmap Framing and Confidentiality

This information provides a general strategic view of Ellucian's anticipated future offerings. The information in this document is confidential and proprietary to Ellucian and neither the document nor its contents can be disclosed to anyone without a written obligation of confidentiality in place with Ellucian.

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Banner Update

Banner 8.x Focus

- Quality
 - Defect resolution on high volume service requests
- Technical Currency
 - Ensure all constituents are able to access information through the browser of their choice
 - Ensures the institution stays current on updated versions of key technology components across the Banner XE solution

Banner XE

 Align with student team and release cadence to support Banner XE Applications

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Banner General 8.5.x and 8.6 releases

- Common Matching, Security, MEP (Banner General 8.5.1)
- Cookie Expansion (Banner General 8.5.1.1)
- Signed JAR Files (Banner General 8.5.1.2)
- Event Management 9.1 Support (Banner General 8.5.1.3)
- 11gR2 and Web Util Support (Banner General 8.5.1.4)
- Security Auditing, GJIREVO Multi-Delete, SDE (Banner General 8.5.2)
- Integration Components Support (Banner General 8.5.2.1)
- HR Support (Banner General 8.5.2.2)
- Banner 9 Support (Banner General 8.5.2.3)
- GTVSDAX Documentation Moved Online (Banner General 8.5.2.5)
- Prevent users from entering 'unwanted' data in Address fields
- Multiple security enhancements including Preventing accidental deletion of grants and enabling INB Terms of Usage Agreement
- Rollup of patches from multiple prior releases for more streamlined support for Banner XE

37 RPEs in the following areas

- Support for Banner XE
- Common Matching
- Documentation
- Job Submission
- MEP
- PCI
- Proxy
- SDE
- Security



Web General 8.5.1, 8.5.2 and 8.6 releases

- Proxy Enhancements for Delete and UI changes (Web General 8.5.1)
- SSB Phone Data Entry Restrictions, Proxy Enhancements (Web General 8.5.2)
- Prevent users from entering 'unwanted' data in Address fields
- Ability to optionally send New Proxy and Delete Proxy communications for the Global Proxy Access process

-eatures

7 RPES addressed in the areas of Data Entry and Proxy



Banner Student Community Education

- Help all institutions maximize and gain the greatest benefit and value from their existing investment in Banner Student
 - Measurably improve business operations
 - Measurably improve customer satisfaction
- Benefits
 - Learn about new and improved features from peers
 - Gain insight into how other institutions are using and benefiting from specific features and functionality
- Session recordings found in the Ellucian Commons

Topics Suggested and Webinars Scheduled to Date

- Archiving application of payment records*
 - October 29th, 2013
- Application checklist for community colleges*
- Veterans processing
- Faculty feedback
- Web for Proxy*
 - September 6th, 2013
- Banner refund process
- Online degree application*
- How to use Banner APIs

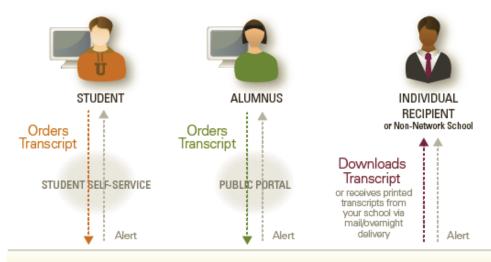
- Any Banner technical webinars
- Extending your database
- Better understanding of the billing process
- Location Management
- Fee Assessment
- BDM usage tips for the Registrar's office
 - July 17th, 2013
- Student centric periods
- Study paths
- FGAC and VBS

* More than one request

Ellucian eTranscript

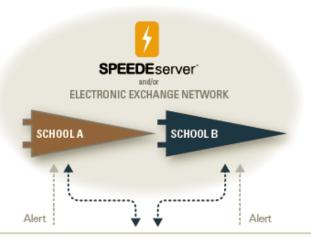
- Partnership with National Student Clearinghouse
- Electronic transcript order and delivery capabilities
 - "Touch-free", real-time, secure
- Order transcripts from the Clearinghouse public site
 - Or via Student Self Service
 - Orders are sent via the eTranscript API into Banner Student
- Available at no cost and requires no additional software
- Delivers on Ellucian XE vision
 - Enabling extensibility across Ellucian student systems

Student to Individual Recipient

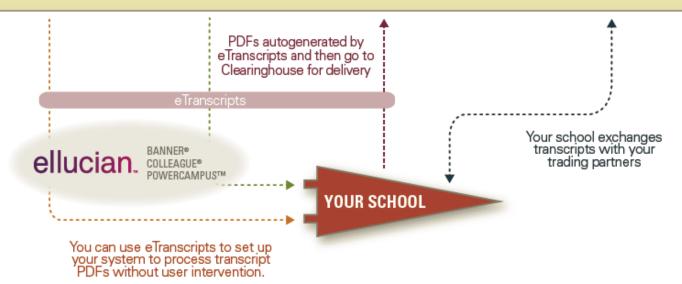


School to School/Agency

- College to college
- College to educational agency (e.g., nursing, teaching, accrediting agency)
- High school to college
- High school and college to state office
- Systemwide exchanges
- Statewide exchanges



NATIONAL STUDENT CLEARINGHOUSE



Banner Requirements for eTranscripts

- To use eTranscripts, each school must:
 - Install Banner Database Extension Utility (DBEU)
 - Upgrade to Banner Student 8.6
 - Upgrade to Banner Student 8.6.2
 - This release includes eTranscript function
 - Be active with Clearinghouse Transcript Ordering
- Projected release schedule Q4 2013

Upcoming Releases in 2013

- Banner Student 8.6 Q4 2013
- Banner General 8.6.2 (Controlled) Q4 2013
- Banner XE Advising 9.0 Q4 2013
- Banner XE Registration
 - Controlled Release Q4 2013
- Banner Student 8.6.2 eTranscript Q4 2013



Ellucian XE

Trends Shaping Higher, Further and Vocational Education

Revenue
Pressures and
Austerity





Accountability and Outcomes

Engaging Students





Globalization

Education Access and Readiness





Transformative Technology

A Bright but Turbulent Future



The Student Experience



Accountability and Outcomes



Funding, Processes, Efficiencies



Transformative Technology

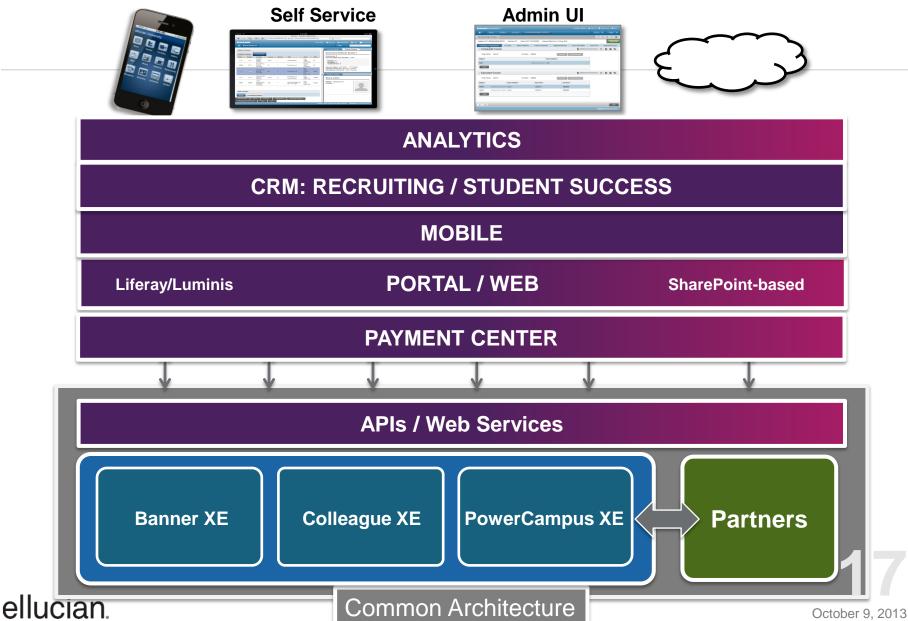
How are you addressing these challenges?

Ellucian Extensible Ecosystem (XE)

- A vision for how we help institutions thrive during a time of dynamic change
 - An extensible and evolving ecosystem of solutions and services
 - An architectural strategy grounded in common principles and standards
 - A portfolio approach that accelerates innovation
 - A better way for customers to evolve their technology environments and protect their investments

October 9, 2013

Extending a Strong Administrative Foundation



The Ellucian XE Vision PBERRY | 🔒 Sign Out | 🌣 Preferences | 🦁 Hel 2 ellucian UNIVERSITY Subject: BUS Business BUS Course: 101 Term: 2016/10 Fall 2015 (2016/10) Course Title: Introduction to Business Fee Codes Degree Attributes Transfer Institutions Supplemental Data Course Description Course Text Integration Partners ■ Insert ■ Delete ■ Copy | Additional Information | ▼ F NOTIFICATION CENTER: 0 Corequisites and Equivale tione Ract ▼ COREQUISITE COURSE From Term: 201610 Carrier 🤝 3:18 PM Banner - Faculty Grade Entry Subject localhost:8080/faculty_grade_entry/ssb/facultyGradeEntry C Google No Records to Display ellucian. UNIVERSITY + Insert Ranner Self-Service **▼ EQUIVALENT COURSE** Getting Started Select a Course To Term: From Term: 201610 Economics ECON 20, Section 1 Midterm Grades Course Number Economics 2 Course Reference Number: 1006 English Fall ENGL Composition 1999 No Records to Display Eligible: 6 (ENGL) (200010)Enrolled: 6 Graded Final: 6 Economics Spring + Insert Economics 1 2000 18 ECON (ECON) (200020)Course Dates: 9/15/2001 - 12/15/2002 Primary Instructor: Brenda J. Potter Fall Economics 2001 Secondary Instructor: Joan Pharoah 1006 ECON Economics 2 200111 (ECON) LP (200111)Accounting Fall Principles of ACCT 2000 10066 Accounting I Nancy Cotton (ACCT) (200110)Core Status: "Registered" Humanities Ancient, Medieval, 2000 10068 Credits: 3 Ren Thought (200110) (CHSM) ter Grades Incomplete Grades ©2000 - 2011 SunGard. All rights reserved. SUNGARD HIGHER EDUCATION ellucian.



Banner XE Update

Driving Your Course to Banner XE



READY

Visit Evolving to
 Banner XE on
 Commons for
 information what has
 already been delivered

SET

 Put Together Your Banner XE Project
 Plan

GO

 Get Involved with Banner XE

From Horizon to Banner XE

2011 2010 2012-2013 2009 **Shared Shared vision Delivered XE** roadmaps Roadmaps and additional **Selected Java** and built initial **Delivered Course** stack platform/ **Catalog and** applications integration Class Schedule

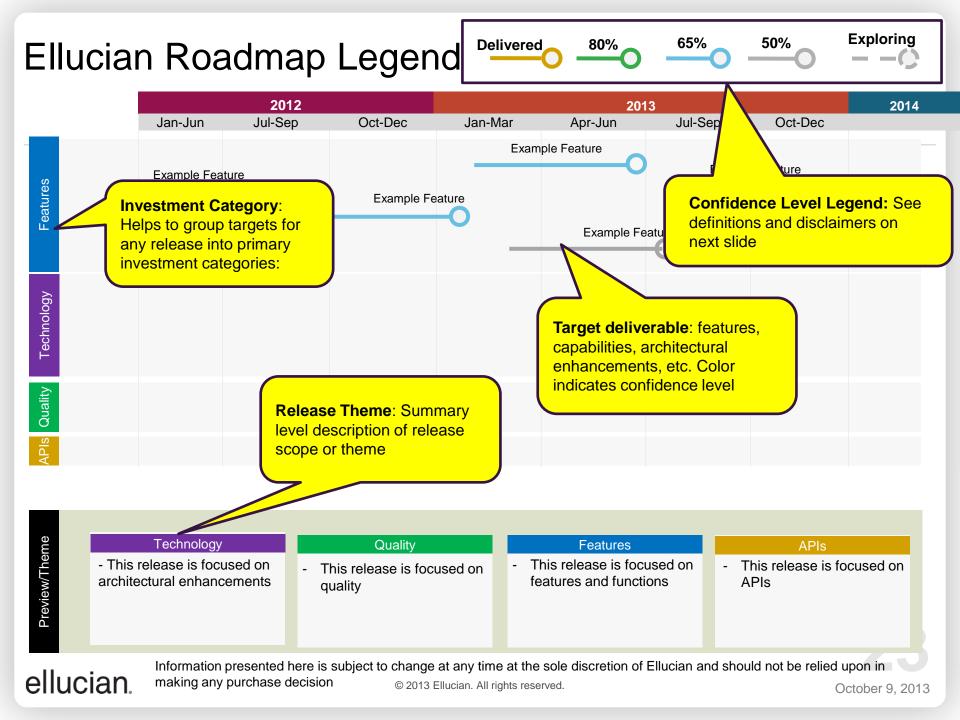
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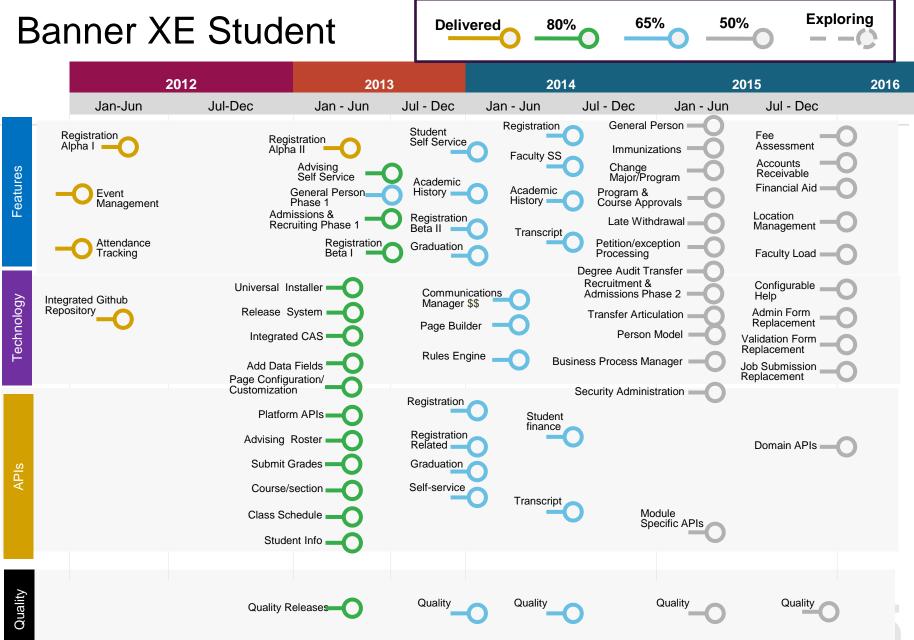


Confidence Level Definitions

We use the term **confidence level** to describe the likelihood that the items on the roadmap will be delivered at the dates shown on the timeline. There are many factors that impact our ability to predict delivery including but not limited to:

- Customer priorities Our releases are driven by customer feedback and prioritization. Sometimes the priorities change due to any number of external factors. At any time, we may change the priorities in any given future release to better reflect our customers' interests.
- Quality Targets Each of our product releases undergoes a stringent quality assurance process prior to release. Should a particular capability not meet our quality targets, we may choose to defer that specific capability to a future release or not complete the development of that capability at all.
- **Design Constraints** In response to customer feedback, we attempt to provide visibility beyond the next product release. In doing so, we share capabilities that reflect customer requests but have not gone through the technical design phase. In some cases, the technical design phase will reveal a larger level of effort and dependencies that make the original timeframe infeasible. Further, the design phase could reveal that the capability is not technically feasible at all or not cost effective resulting in abandonment of effort.
- Budget Cycles For roadmaps that might include visibility beyond the current Ellucian fiscal year budget, all items are subject to financial progress against goals and the availability of funds for that particular project in future budget cycles.
- Engineering Forecasting Accuracy All roadmap items are subject to some level of forecasting accuracy imprecision resulting in certain functionality pushing out to later releases on a roadmap timeline.

The further out the release date, the higher the likelihood that one or more of these factors will impact the accuracy of our roadmaps. That is why we clearly indicate less than 100% confidence for our next release even though it may scheduled to be released in the short-term, and why we use decreasing confidence levels for items that are further out on the roadmap.



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Timing is Everything

- First half of the roadmap is designed to impact learning and student success:
 - Self Service for Advisors, Faculty, and Students
 - All Academic Administrative functions
- Second half of the roadmap is designed to have greater impact on efficiencies and student financial management
 - Business Process Management and Automation
 - Fee Assessment, Financial Aid, A/R





Banner XE Applications

Banner XE is Available Today!

Catalog & Schedule – September 2011

- Improved global user experience

Faculty Grade Entry – January 2012

- Improved grading tools help better serve students

Attendance Tracking – September 2012

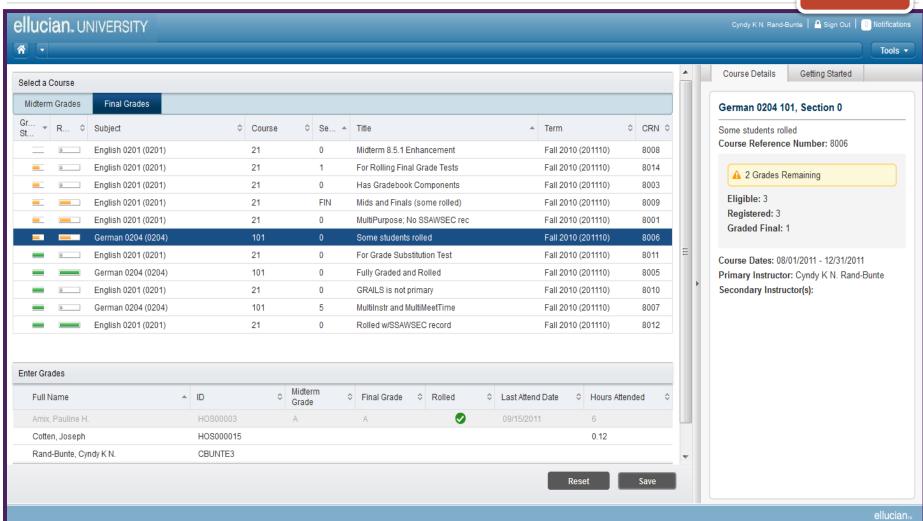
- Record attendance on a learning event
- Complements Faculty Grade Entry

Event Management - February 2012

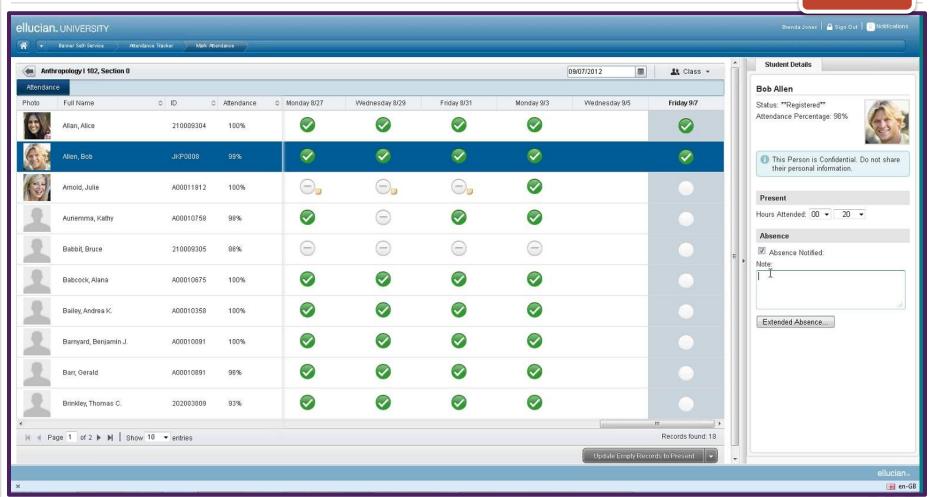
- More efficient registration and attendance



Faculty Grade Entry



Attendance Tracking

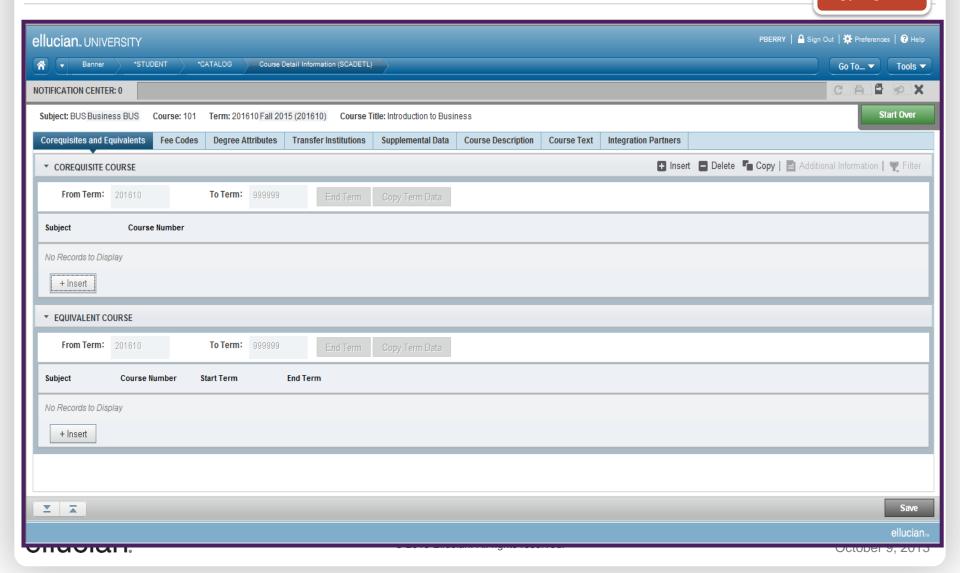




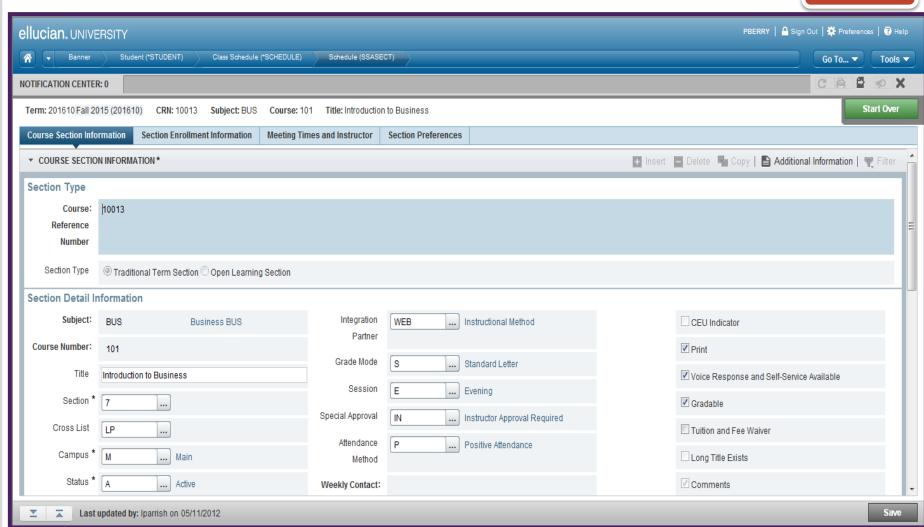
Event Management

ellucian. UNIVERSITY A Sign In		
Create an Account		
Profile Information: To continue you will need to create a guest account		
First Name *	Street	Address
Last Name *	Street Addres	ss Line 2
Surname Prefix		City
E-mail Address *	State or F	Province Please Select
Date of Birth (MM/DD/YYYY)	ZIP or Pos	
Phone	Country Code Area Code Number Extension	Country Please Select
Username and Password		
Username		
Password *		
Re-Type Password *		
		Cancel Create Account
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Course Catalog



Class Schedule





Banner XE Development Partners

Banner XE Development Partners

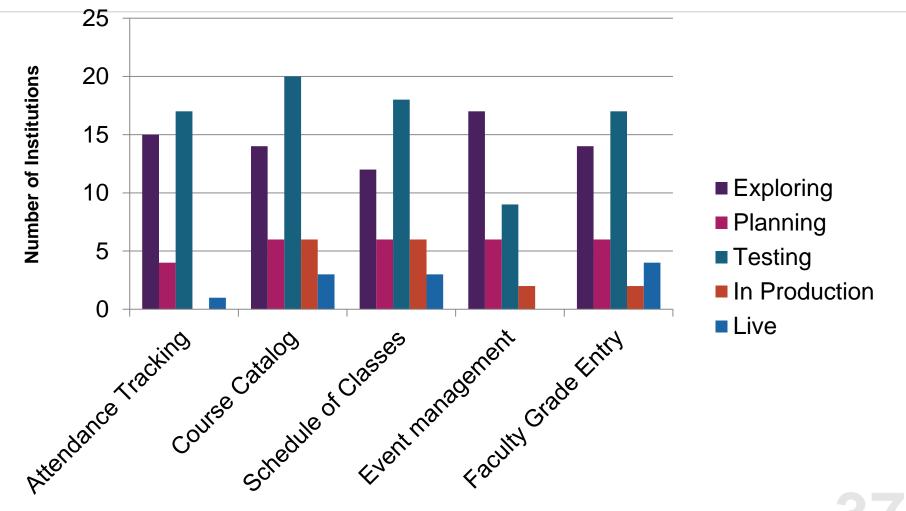
- Each XE project has a set of partners
- Assist the development teams:
 - Weekly calls
 - Requirements definition
 - Page design wireframes
 - Process flow
 - Alpha testing
 - Controlled release testing and adoption
 - **6**, 13, 12, 12
- Critical to XE success!

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Supporting 81 Early Adopters

Banner XE customer adoption



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Early Adopter Cohort 1 (8)

- Georgia Institute of Technology
- Purdue University Main Campus
- Shippensburg University of Pennsylvania
- Texas Tech University
- The University of Alabama
- University of Illinois University Administration
- University of Notre Dame
- University of Oklahoma Norman Campus

Early Adopter Cohort 2 (14)

- Abu Dhabi Vocational Education and Training Institute (ADVETI)
- Board of Regents of the University System of Georgia
- Brown University
- Central Oregon Comm Coll
- Drew University
- Fordham University
- Khalifa University of Science, Technology and Research (KUSTAR)
- Lansing Community College
- Northwest Missouri State University
- Oswego State College (SUNY)
- Portland State University
- United Arab Emirates University Islamic Institute
- Virginia Polytechnic Institute and State University
- Wichita State University

Early Adopter Cohort 3 (16)

- BI Norwegian Business School
- Bucknell University
- Drexel University
- Florida Atlantic University
- Florida Gateway College
- Harding University (Main Campus)
- Indiana State University
- Kwantlen Polytechnic University
- Liberty University
- Middlesex University
- Pacific Lutheran University
- Rose-Hulman Institute of Technology
- St Louis Community College
- Stephen F. Austin State University
- University of North Carolina at Greensboro
- University of North Carolina General Administration

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Early Adopters not currently in a Cohort (36)

- Athens State University
- California University of Pennsylvania
- Collin County Comm Coll District
- Colorado Seminary (Univ of Denver)
- Fisk University
- Hamline University
- Hofstra University
- Indiana University of Pennsylvania
- Kalamazoo Valley Community College
- King Fahd University of Petroleum and Minerals (KFUPM)
- Metropolitan State University of Denver
- Missouri Southern State University
- Pace University
- Pima County Community College
- Plymouth State University
- Qatar University
- Rice University
- Rowan University

- San Mateo County Community College District Office
- Santa Barbara City College
- Seattle Pacific University
- Snow University (Utah)
- Southern Utah University
- St. Catherine University
- The College of Saint Scholastica
- Universidad de Monterrey
- Universite Libre de Bruxelles ULB
- University of Greenwich
- University of Montana Missoula
- University of Northern Colorado
- University of Southampton
- Valencia College
- Wake Forest University
- Weber State University
- West Virginia Network for Education
- Yale University



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Clients Live on Banner XE Applications

- Brown University
 - Course Catalog
 - Class Schedule
- Purdue University Main Campus
 - FGE limited rollout
- Shippensburg University of Pennsylvania
 - Course Catalog
 - Class Schedule
 - Faculty Grade Entry
- St. Louis Community College
 - Attendance Tracking
- University of North Carolina at Greensboro
 - Course Catalog
 - Class Schedule
- University of Oklahoma Norman Campus
 - Faculty Grade Entry
- Wichita State University
 - Faculty Grade Entry limited rollout

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Customers Awaiting the 9.2 Versions

- Address Performance concerns
- Address Quality issues
- "Big Test" environment ODS, Luminis, DegreeWorks
 validate similar to customer
- Scale registration stand alone and a mix of applications to 2500 concurrent users
 - 2000 Self-Service, 500 admin
- Create Banner XE Sizing Guide
- Environment Information 4 application servers-16GB RAM, 4CPU
- 28,281 students adding and dropping
- 141,405 total number of transactions

43



XE Projects in Development

XE Projects in Development

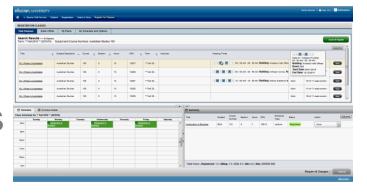
- XE Registration
 - Controlled Release 1 (CR 1) Q4 2013
 - General Availability Q4 2014
- XE Advising Q4 2013
- XE Academic History Q4 2014
- Banner Communications Management Q2 2014
- XE Admissions & Recruiting 2014 TBD



XE Registration

What's Changing

- All registration related administrative forms
- All registration related SSB
 - Students and advisors
- New student & advisor pages
- New administrative pages
 - Support advising and new registration models
- Configuration of pages
 - Field, button and tab labels
 - Page position



Persona Focus

- Students first
 - Alpha I, Alpha II, Controlled release I
- Advisors and Administrators next
 - Controlled Release II Q1 2014
 - General Release Q4 2014



XE Registration Session after lunch today

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Academic Advising

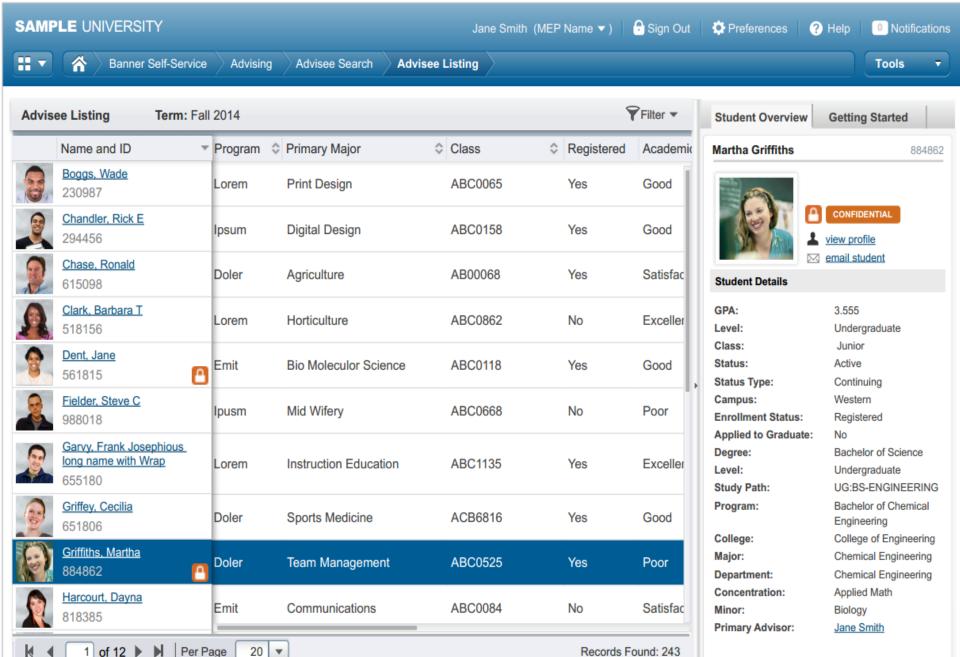
Advisor Self Service

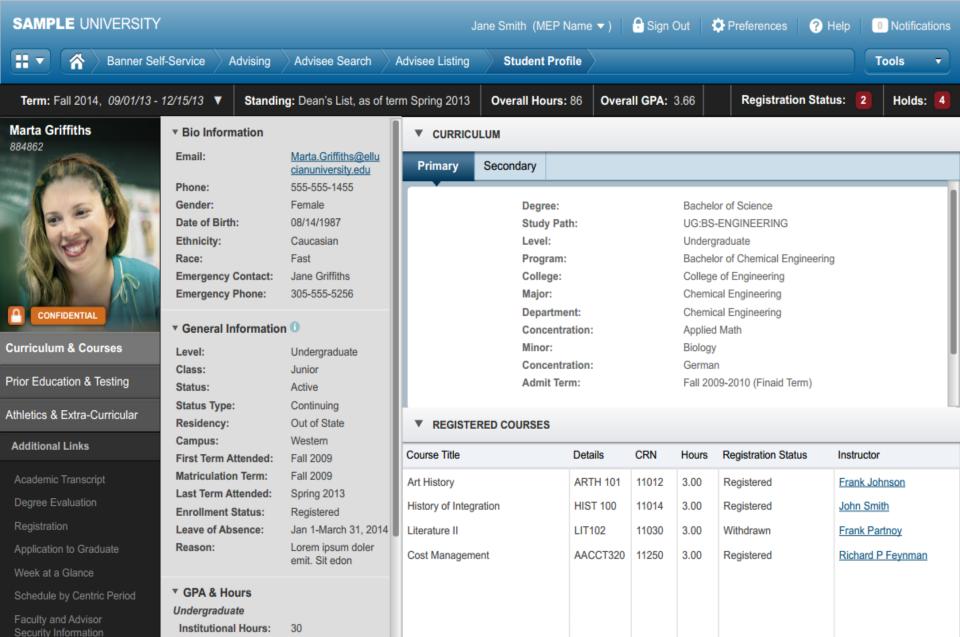
Purpose:

 Enable Advisors, Tutors, and Mentors to view (phase one) and work with (phase two) a profile of key institutional information to inform the best decisions and directions possible.

Target Deliverables:

- All functionality inherits the principles of usability, extensibility, configurability, and security
- Advising Roster, with key data available at first glance
- Student profile with ~2 dozen default data elements





Total Hours | Registered: 12.00 | CEU: 0.00

GPA:

GPA:

Transfer Hours:

3.50

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3.55

Banner Communication Management

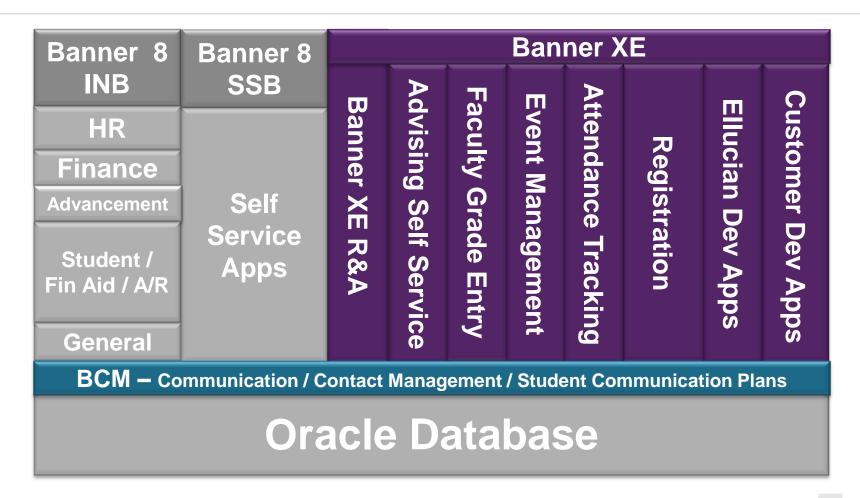
Phase 1 Focus

- Expand Data Access including Localizations and Integration with Banner ODS
- Enhance tactical and operational communication (Email, SMS, Paper, Targeted Announcements) with Prospects, Students, Employees, Vendors
- Improve Ability to Track and View Contacts, Comments, Notes in multiple functional areas in Banner
- Integration with Banner XE Applications such as Banner R&A XE, Banner Event Management XE, Banner Registration XE

	Usability	Features/ Functionality	Single Global Product	Configuration	Extensibility	Scalability	Cloud Delivery
Data Access	X	X	X	Х	Χ	X	
Multi Channel Communication	Χ	X	Χ	Χ	Χ	X	
Student Communication Plan Management	X	Х	Х	X	Χ	X	
Contact Management	Χ	X	Χ	Х	Χ	X	
Template Management	X	X	Х	Χ	X	Х	X

- BCM Direction Aug 2013
- DPG Formation August/Sept
- Kickoff Q4 2013
- GA 2014

Banner Communication Management XE



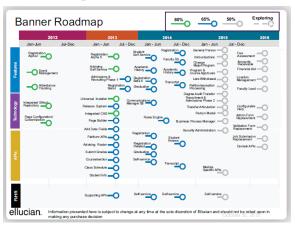




Summary

Where to learn more about Banner XE

- Visit the Banner Commons
 - Evolving to Banner XE page
 - Read the FAQs
 - Functional and technical webinars
 - Explore the Banner XE digital shorts
- Product Roadmaps
 - Ellucian.com/roadmaps



Driving Your Course to Banner XE



READY

Visit Evolving to
 Banner XE on
 Commons for
 information what has
 already been delivered

SET

 Put Together Your Banner XE Project
 Plan

GO

Get Involved with Banner XE

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Thank You! ed.hauser@ellucian.com