

Keynote:

Learn More about Ellucian XE and the transformation of Banner

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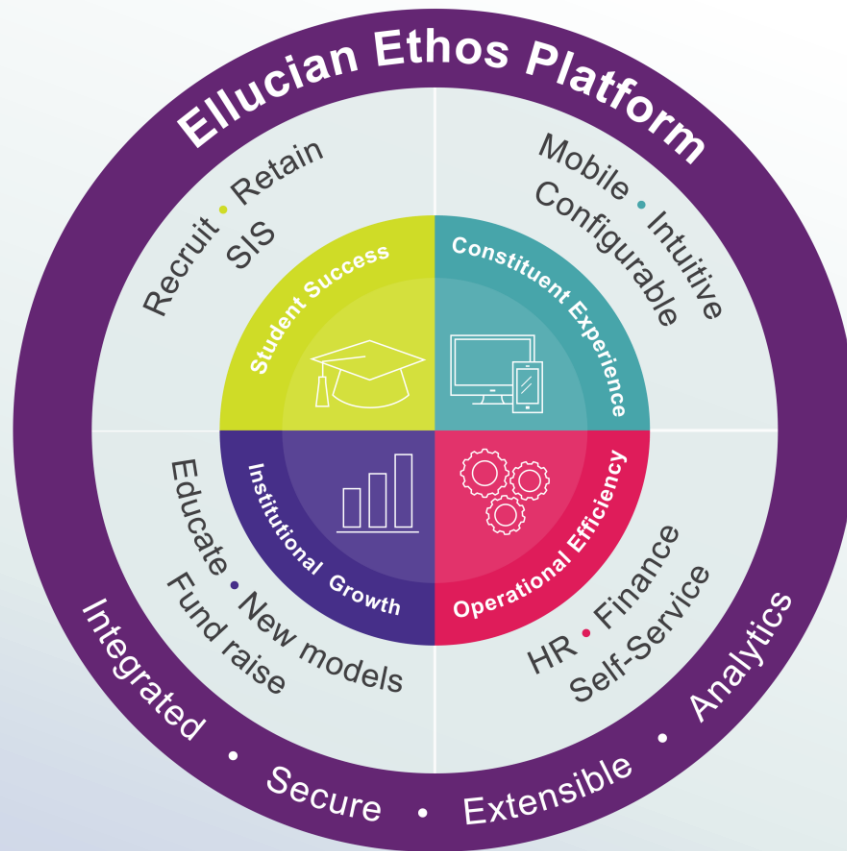
Mike Bates

Principal Solutions Engineer

Achieving student success advances  
our entire society

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## Platform

Integrated

Secure

Extensible

Analytics





Evolving with XE

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## Ellucian XE Design Principles



**Usability**



**Enhanced  
Features and  
Functions**



**Configuration  
over  
Customization**



**Extensibility**



**Scalability/  
Cloud  
Readiness**



## What it means for you

- ✓ Outstanding user experience
- ✓ Strength at the core
- ✓ Extending campus environments
- ✓ Future-ready technology



# Ellucian XE Applications

## Available Today

### Banner Human Resources

- HR Administration
- Employee Profile
- Position Description

### Banner Finance

- Finance Administration
- Purchase Requisition

### Banner Student

- Academic history, electronic grade book
- Advising and Student Profile
- Attendance Tracking
- Faculty Grade Entry
- Registration & Student Planning
- Ellucian eTranscript APIs

### Banner General

- General Administration
- Communication Management
- Event Management
- Direct Deposit
- Event Publisher



## In Development

### Banner Human Resources

- Effort Reporting & Labor Redistribution
- Web Time Entry
- Salary Planner

### Banner Finance

- Budget Availability

### Banner Student

- Student Administration
- Online Enrollment
- Class Roster
- Records Request

### Banner Accounts Receivable

### Banner Financial Aid

- Financial Aid Administration
- Banner Advancement

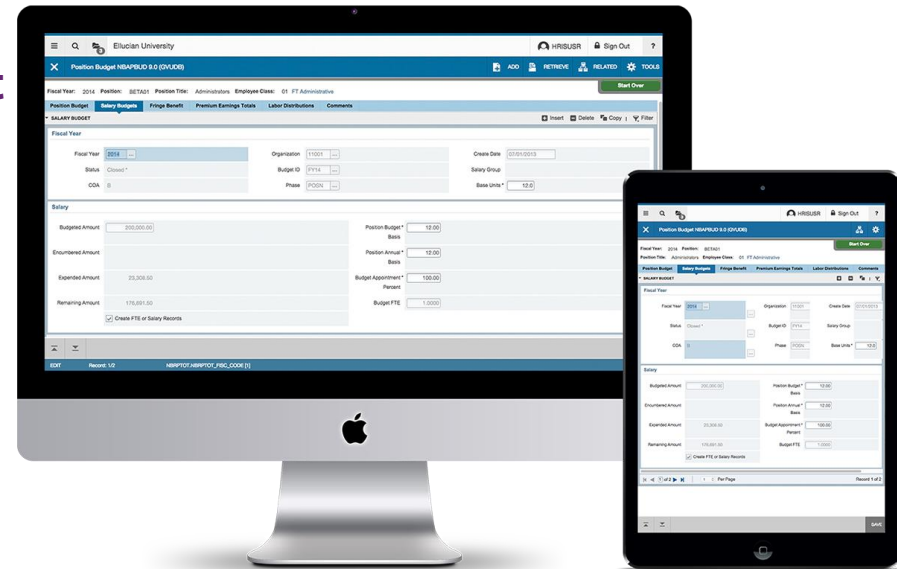
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# A Year in Review

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## Continued momentum with Ellucian XE

- ✓ Banner Position Description
- ✓ Banner Purchase Requisition
- ✓ Banner Communication Management
- ✓ Banner Human Resources Admin
- ✓ Banner Finance Admin





# Position Description

ellucian

Home • Position Description

3 USERNAME

Position Description

Position Description Library

Create New

Position Number	Position Class	COA	Organization	Effective Date	Status
<b>Inprogress 5</b>					
123456-Economic Professor	122256-Economic Professor	E	11041-Internal Technology	01-Jan-2015	Draft
223345-Maths Professor	221115-Maths Professor	L	11041-Internal Technology	24-Feb-2015	Returned
002345-Design Professor	234123-Design Professor	H	11041-Internal Technology	28-Feb-2015	Returned
<b>Submitted Queue 5</b>					
123456-Art Professor	123111-Art Professor	D	11041-Internal Technology	03-Jan-2015	Pending
123111-History Professor	124321-History Professor	F	11041-Internal Technology		

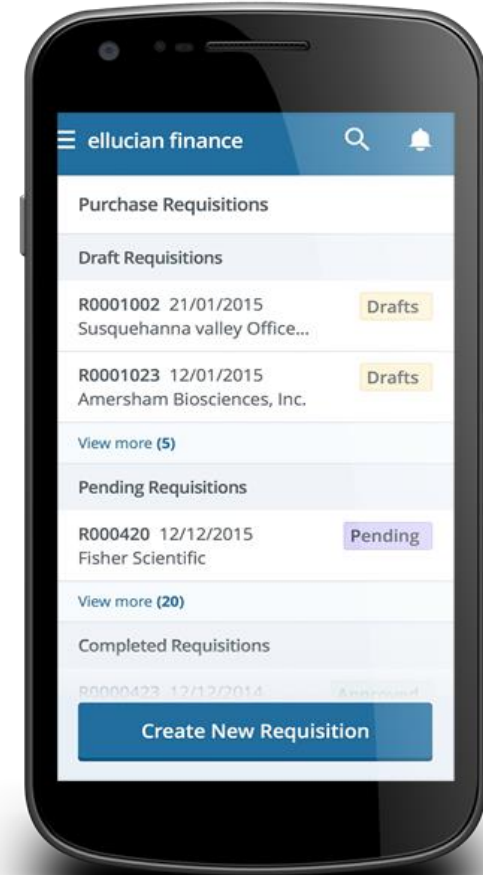
View More

# Modernizing Banner – Self Service Imperatives

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## Self-Service Modernized with XE

- Mobile first approach
- Responsive design technology
- Task oriented features
- Accessed directly from your browser and/or Ellucian Go
- Allows you to take Banner with you to make better business decisions



Banner  
Human  
Resources  
Administration

Banner  
Finance  
Administration

Banner  
General  
Administration

Ellucian University

HRISUSR Sign Out

ADD RETRIEVE RELATED TOOLS

Start Over

ID: 710000023 Dr. Gerald James LNPrefix Goodhart, test

Insert Delete Copy More Information Filter

Year	Payroll ID	Payroll Number	Sequence Number	Event Type	Event Type Description	Disposition
2015	SB		1	0 C	Original	20
2014	SB		13	0 C	Original	70
2014	SB		13	1 M	Manual	27
2014	SB		13	2 V	Voided	47
2014	SB		11	3 I	Reissued	37
2014	SB		10	0 C	Original	20
2014	SY		18	0 C	Original	42
2013	SB		18	0 C	Original	50
2013	SB		12	0 C	Manual	47
2013	SY		11	0 C	Original	70
2013	SY		10	0 C	Original	70
2013	SY		10	1 V	Original	47
2013	SY		10	2 I	Voided	47
2013	SY		10	0 C	Reissued	70
2013	SY		9	0 C	Original	70
2013	SY		8	0 C	Original	70
2013	SY		7	0 C	Original	70

Record 1 of 80

ellucian

17 Per Page

Activity Date 09/23/2015 12:00:00 AM

PHRIST.PHRIST\_YEAR [1]

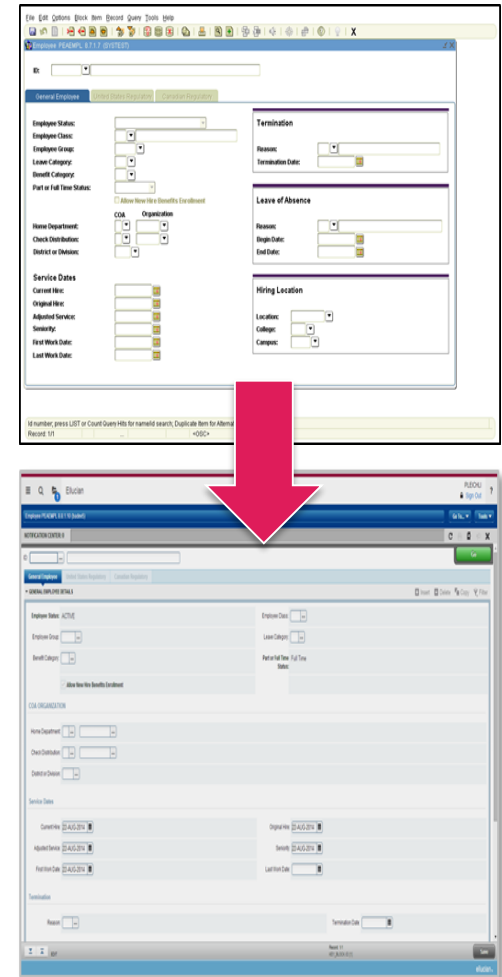
READ Record: 1/80

# XE Applied to Administrative Applications

## Banner INB Modernized with XE: It's YOUR Banner

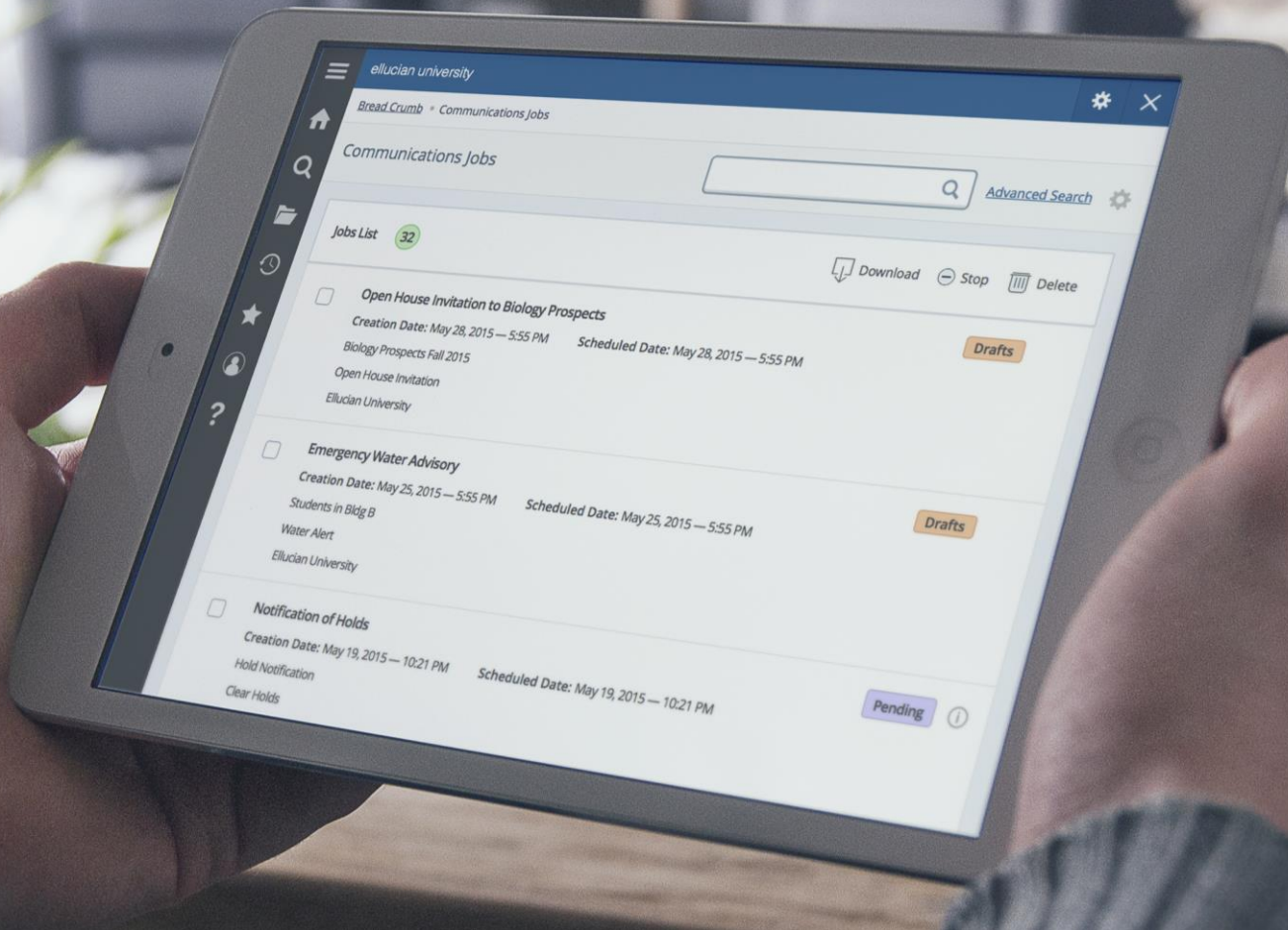
- Eliminating Oracle Forms and Oracle Reports
- Delivers new HTML/JavaScript administrative pages and reports
- No Java applet required in the end user's browser
- Positions for cloud delivery
- Introduces Notification Center
- Provides enhanced navigation for a seamless experience
- Provides consistent look and feel across Banner
- Eases upgrade process
- Leverages your database, your business rules and your data.

## It's YOUR Banner

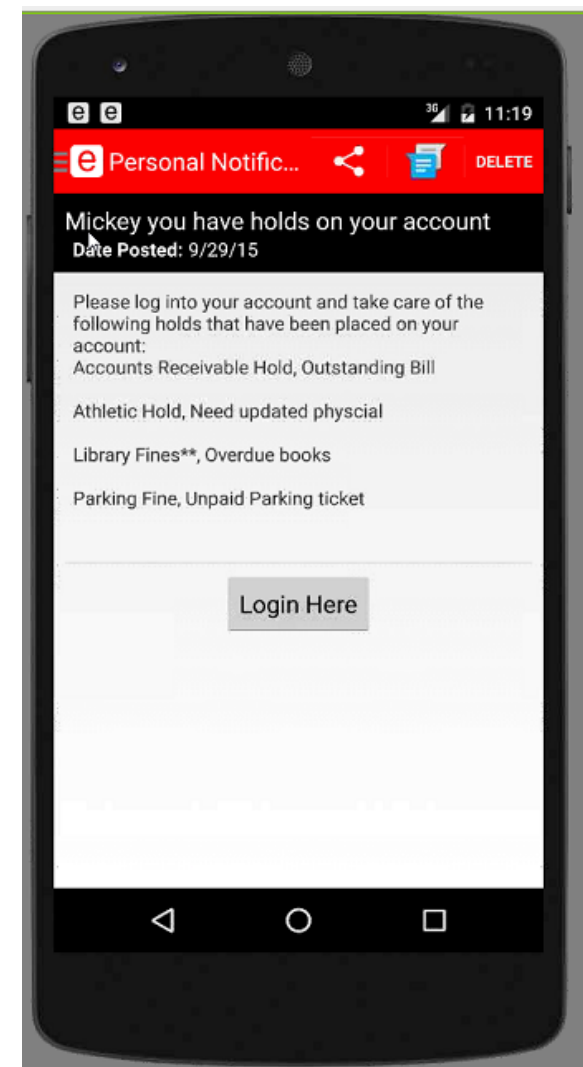
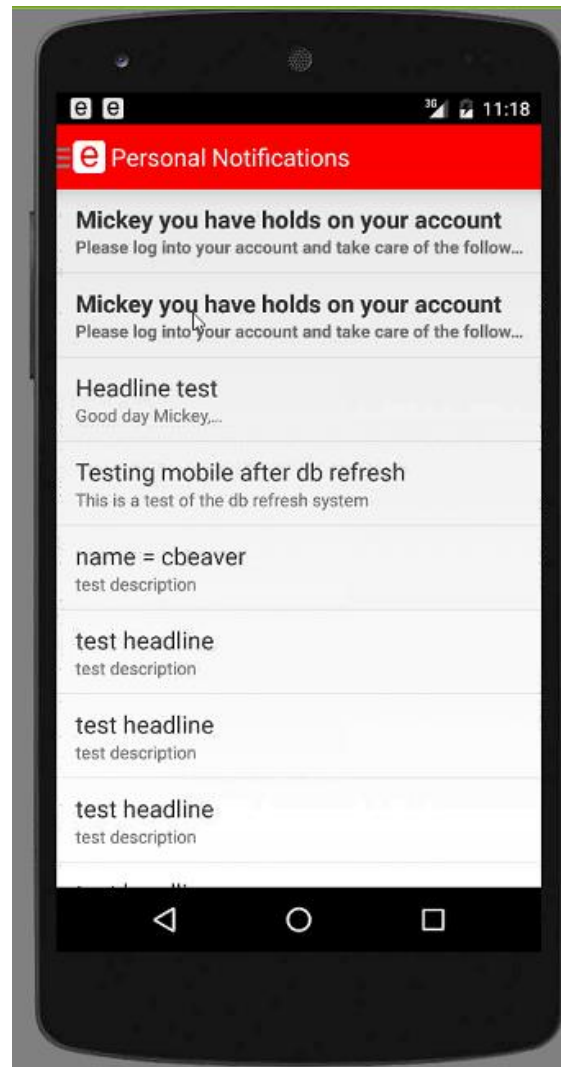
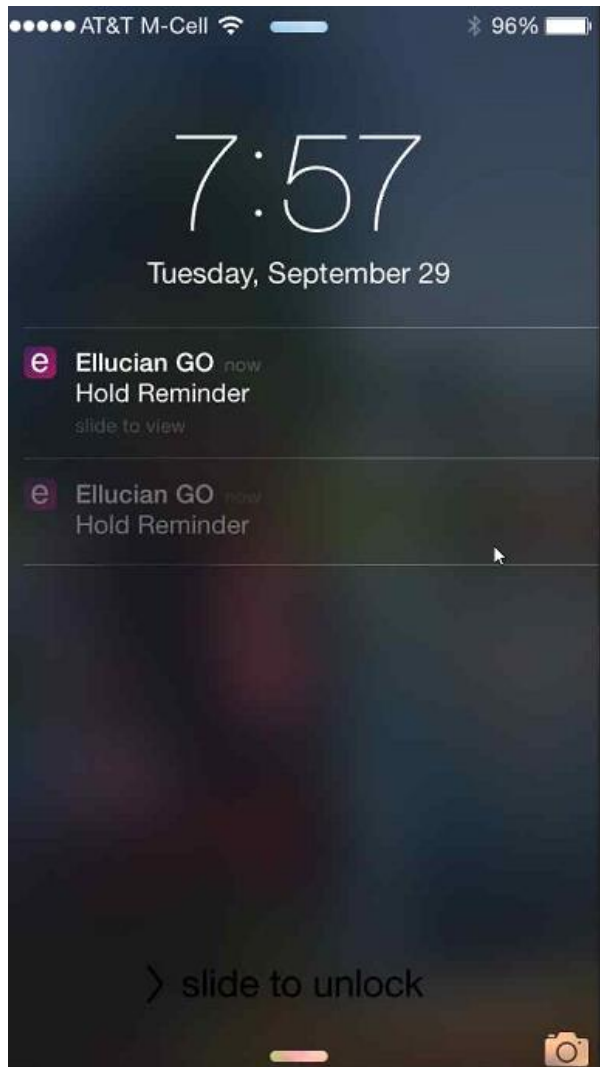




# Banner Communication Management



# Banner Communication Management Notifications in Ellucian Go



A photograph of three business professionals sitting around a wooden table in a bright, modern office. On the left, an older man with grey hair and glasses, wearing a dark sweater, sits with his arms crossed, looking towards the center. In the middle, a younger man with dark hair, wearing a blue blazer over a checkered shirt, sits with his hand to his chin, looking towards the woman on the right. On the right, an older woman with short grey hair and glasses, wearing a pink shirt, sits with her hands raised in a gesturing motion, looking towards the man in the middle. The table is cluttered with papers, a calculator, and a pen. Large windows in the background let in bright natural light. A large, semi-transparent pink circle is overlaid on the left side of the image, containing the text 'What's Coming'.

What's Coming



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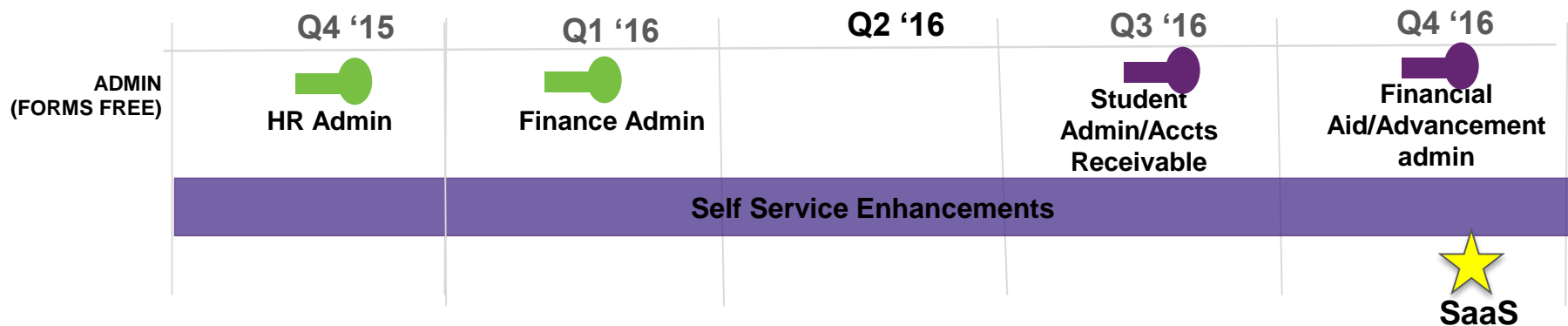
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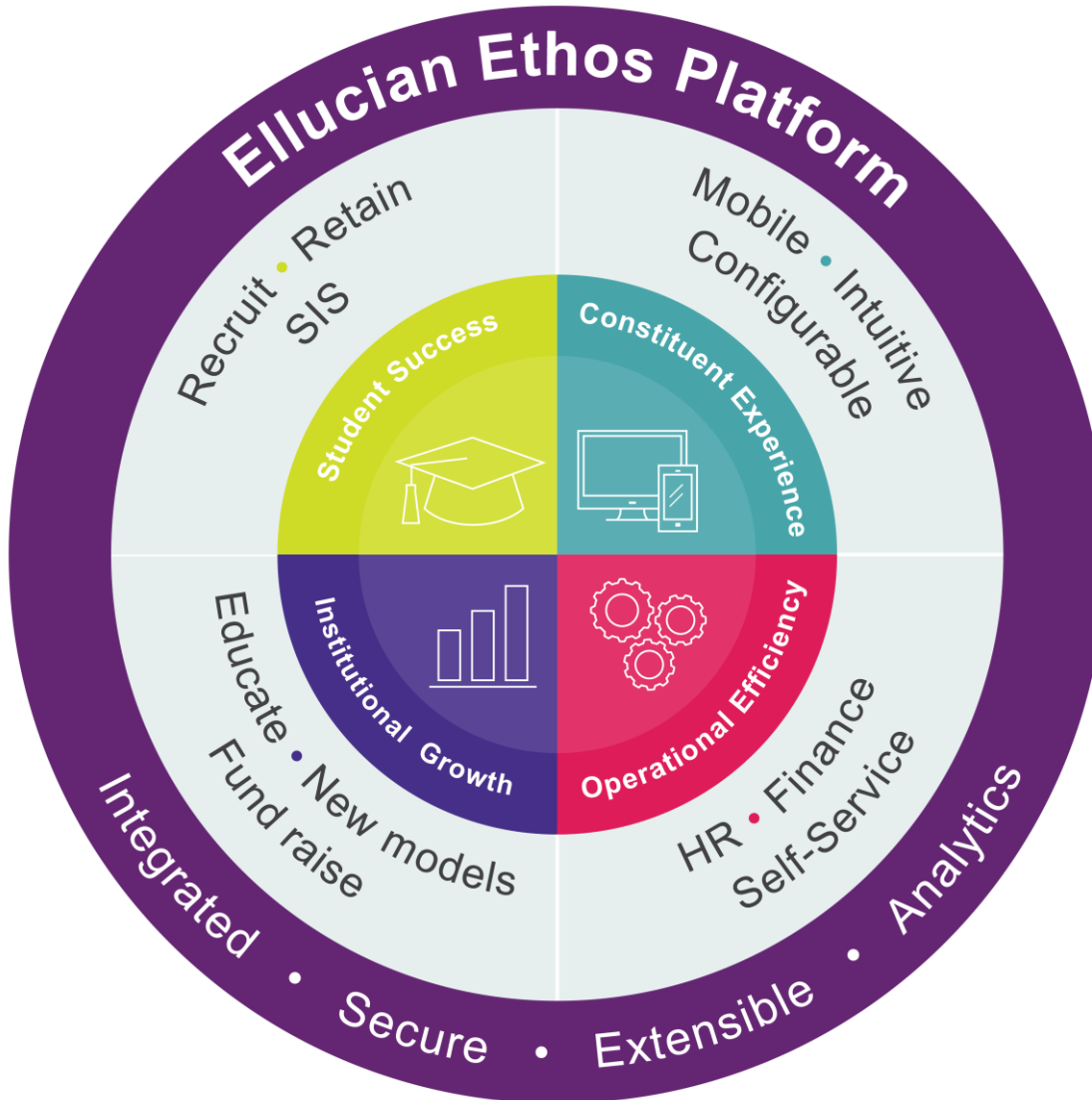
# 2016 Timeline <https://ellucian.com/roadmaps>

- Complete transformation of Banner administrative applications
- SaaS by end of 2016
- Steady cadence of self service releases

The screenshot displays the 'Position Budget' form in the Banner system. The form includes fields for Fiscal Year (2014), Position (001A14), Position Title (Administrators), Employee Class (01), and FT Administrator. It also shows tabs for Position Budget, Salary Budgets, Fringe Benefit, Premium Earnings Totals, Labor Distributions, and Comments. The Salary section includes fields for Budgeted Amount (200,000.00), Encumbered Amount, Expended Amount (23,300.00), and Remaining Amount (176,691.00). Other fields include Organization (T1001), Budget ID (FY14), Phase (PORN), Create Date (07/01/2013), Salary Group, Base Units (12.0), Position Budget Basis (12.00), Position Annual Basis (12.00), Budget Appointment Percent (100.00), and Budget FTE (1.0000).



# Ellucian Ethos Platform



Integrated

Secure

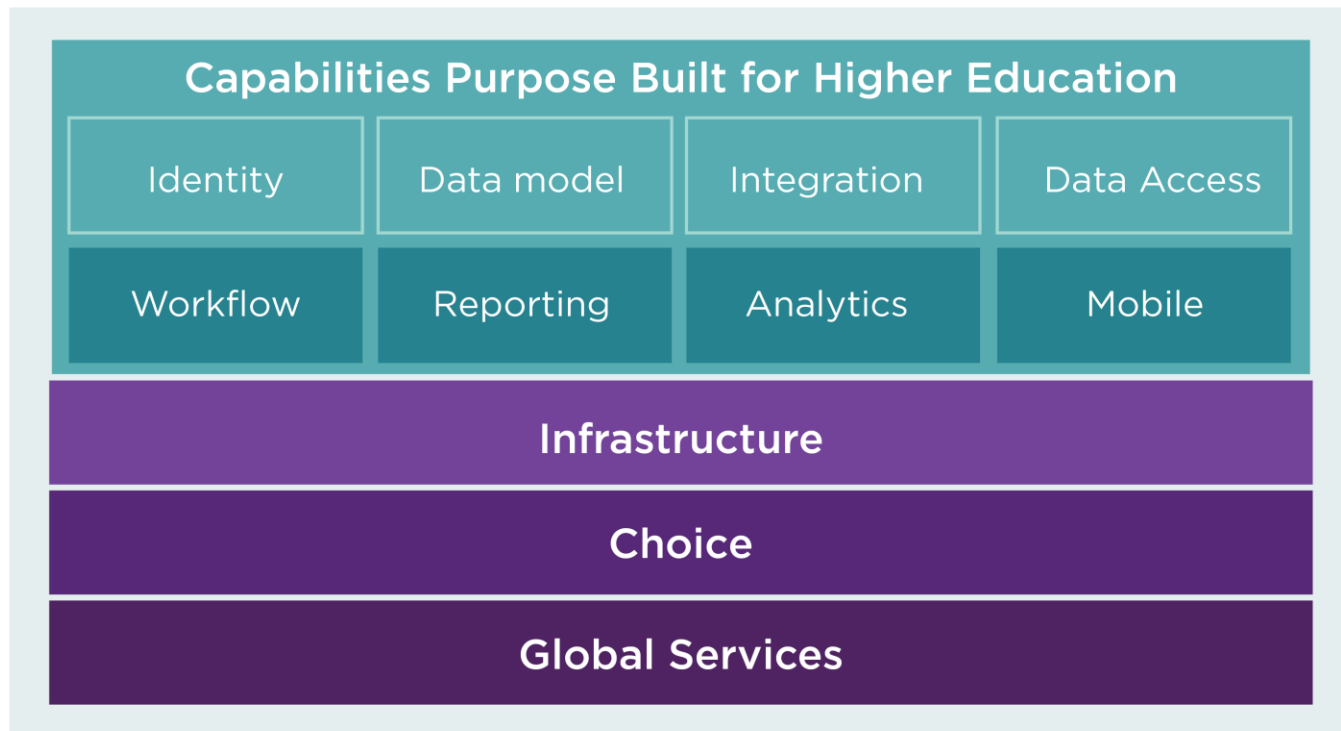
Extensible

Analytics

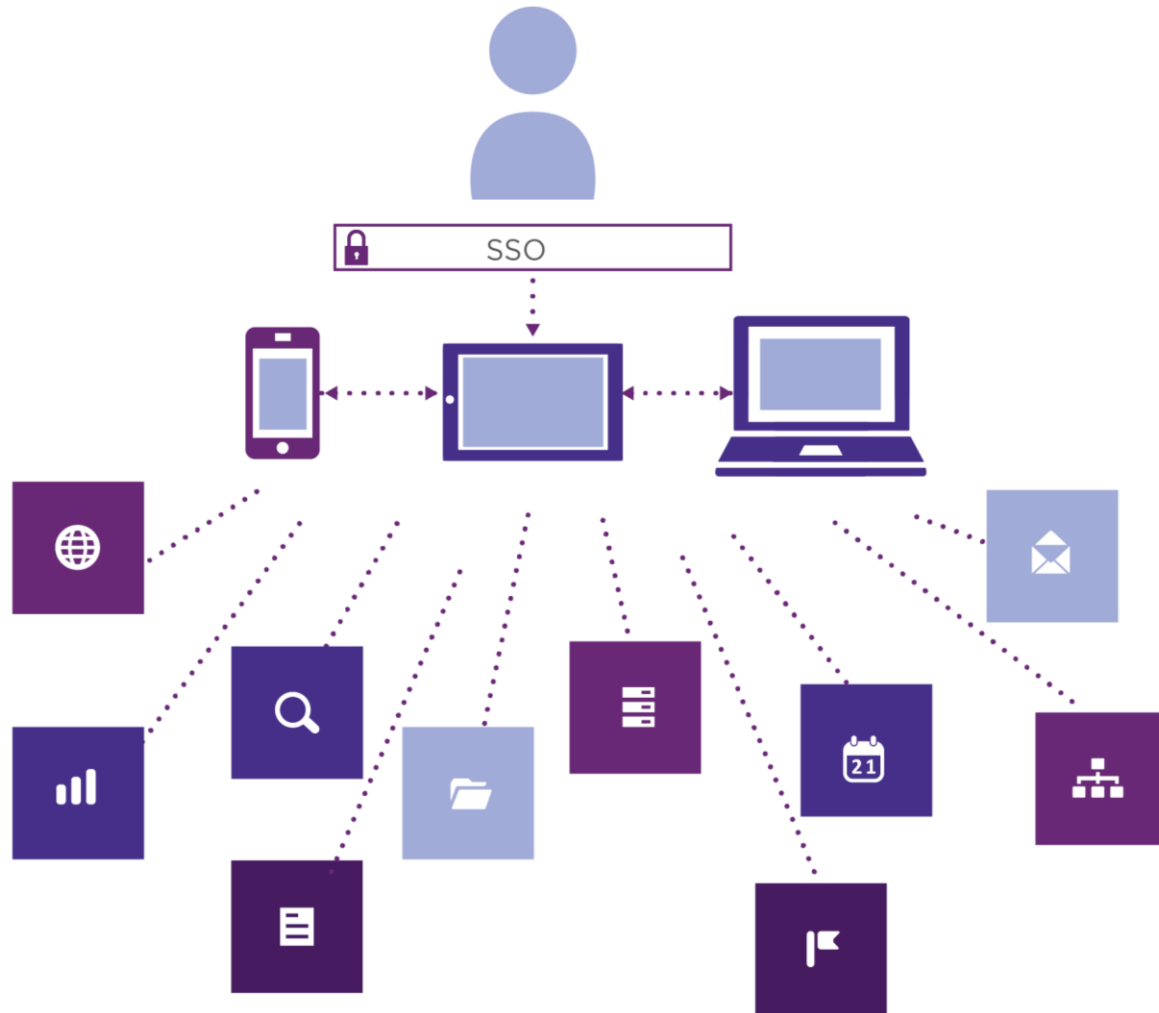
# Ellucian Ethos Platform

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## Ellucian Ethos Platform

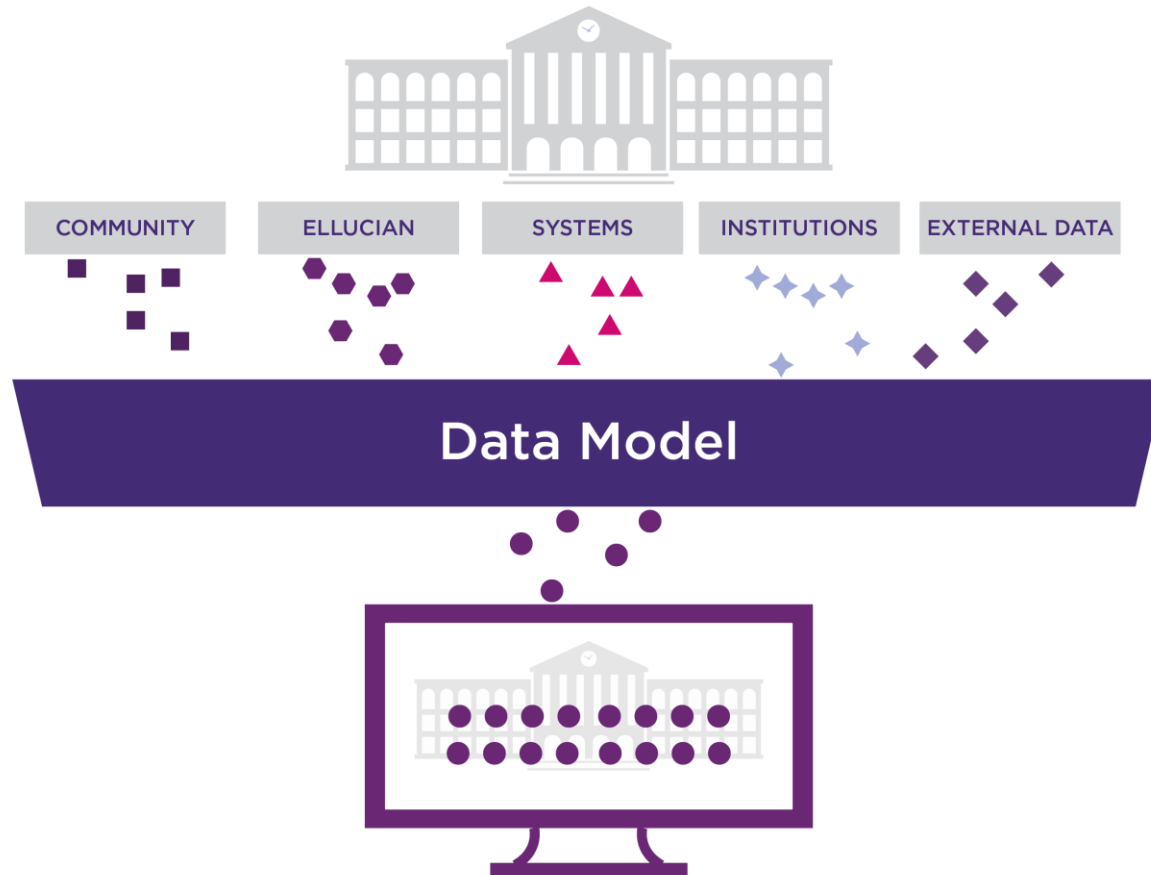


# ELLUCIAN ETHOS IDENTITY





# ELLUCIAN ETHOS DATA MODEL



- Entities
- Search for entities

Q
- Filter by attribute

▼
- Academic Catalogs

Academic Credentials

Academic Disciplines

Academic Histories

Academic Honors

Academic Levels

Academic Periods

Academic Program Enrollments

Academic Programs

Account Components

Accounting Transaction Types

Administrative Periods

Api Links

Appeal Purposes

Appeal Types

Appeals

Areas Of Giving

Course

Download ▾

Overview

Delete

Get

Post

Put

Changelog

Overview

Description

In HEDM, a course is a unit of teaching on an individual subject that typically lasts one academic term. A grade and academic credit can be awarded on successful completion of the course.

Each course can be offered at different levels of complexity, from introductory to advanced, or in-depth, study of a specialized topic, and at various academic levels.

Multiple instructional methods may be used in teaching each course, and different grade schemes and credit specifications can apply to it.

In case of a multidisciplinary course, teaching responsibilities may be shared between two or more departments (organizations) within the academic institution.

HEDM Entity Relation Graph

```
graph TD; sections --> course-levels; sections --> instructional-methods; sections --> organizations; sections --> academic-levels; sections --> grade-schemes; sections --> credit-categories; sections --> courses; courses --> course-levels; courses --> instructional-methods; courses --> organizations; courses --> academic-levels; courses --> grade-schemes; courses --> credit-categories;
```

Properties

courses

+ metadata : Metadata about the JSON payload

id\* : A global identifier of a course to be used in all external references.

title\* : The full name of a course as might appear in a course catalog (e.g. 'Calculus').

\* = required field

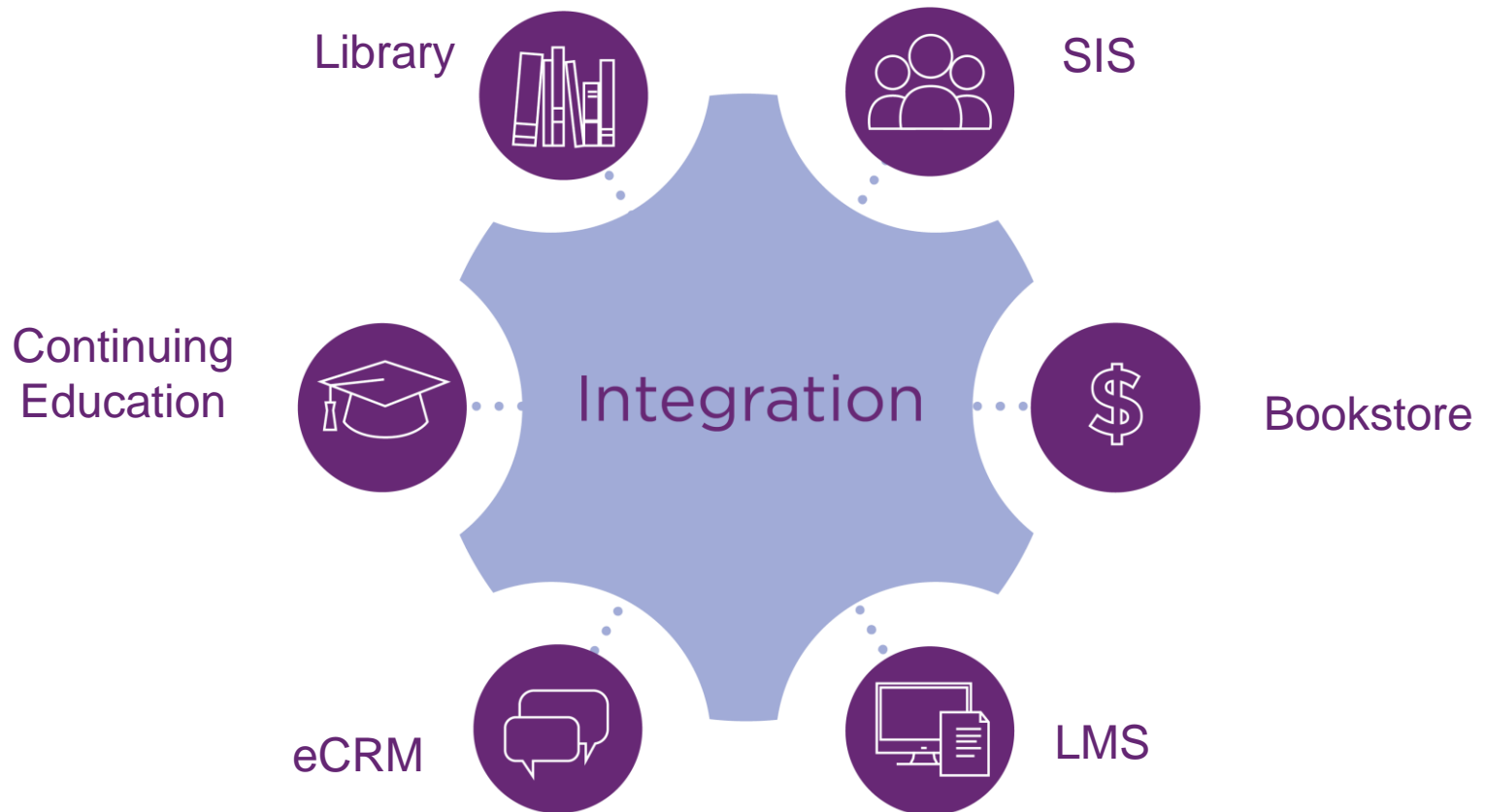
object/array

link

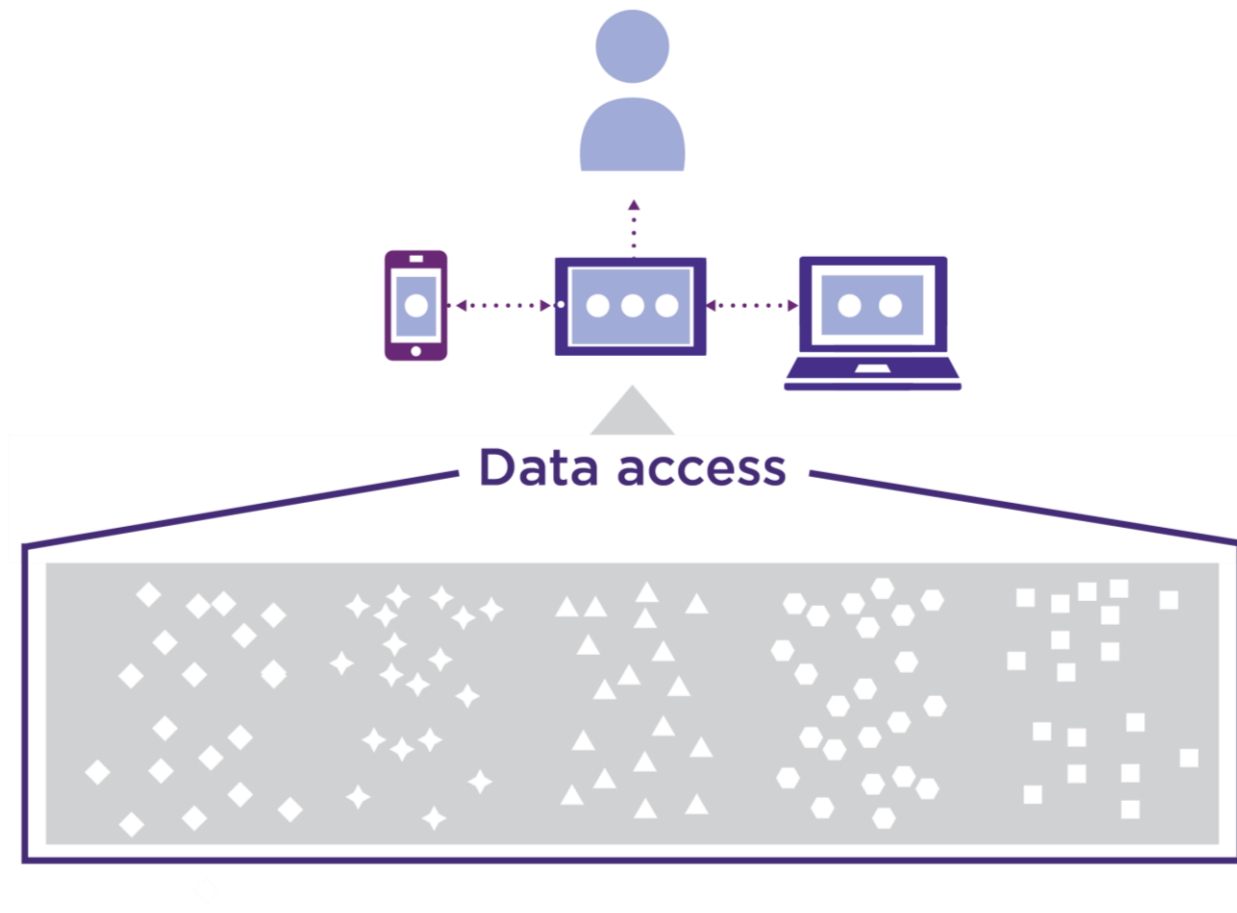
oneOf

# ELLUCIAN ETHOS INTEGRATION

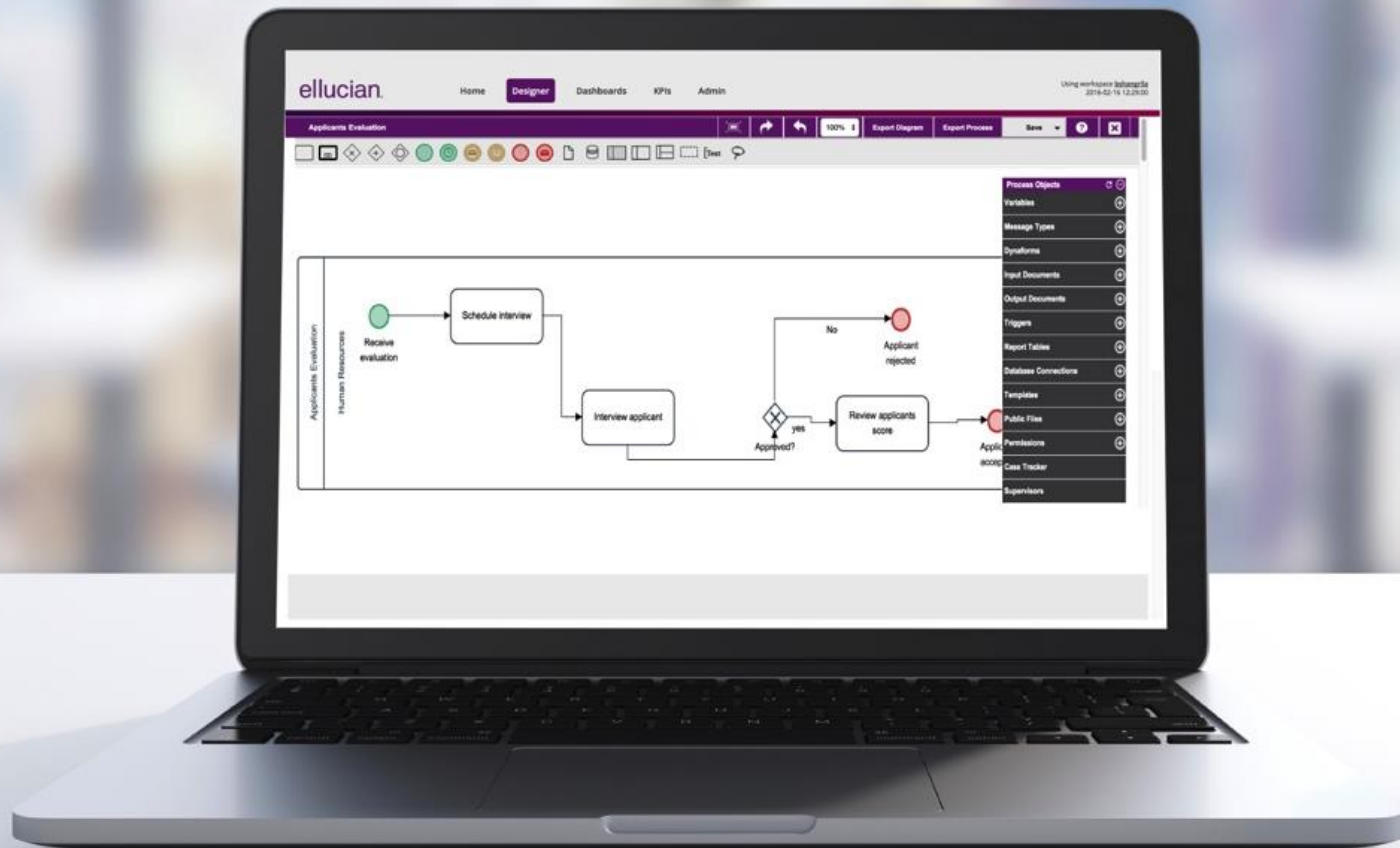
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# ELLUCIAN ETHOS DATA ACCESS

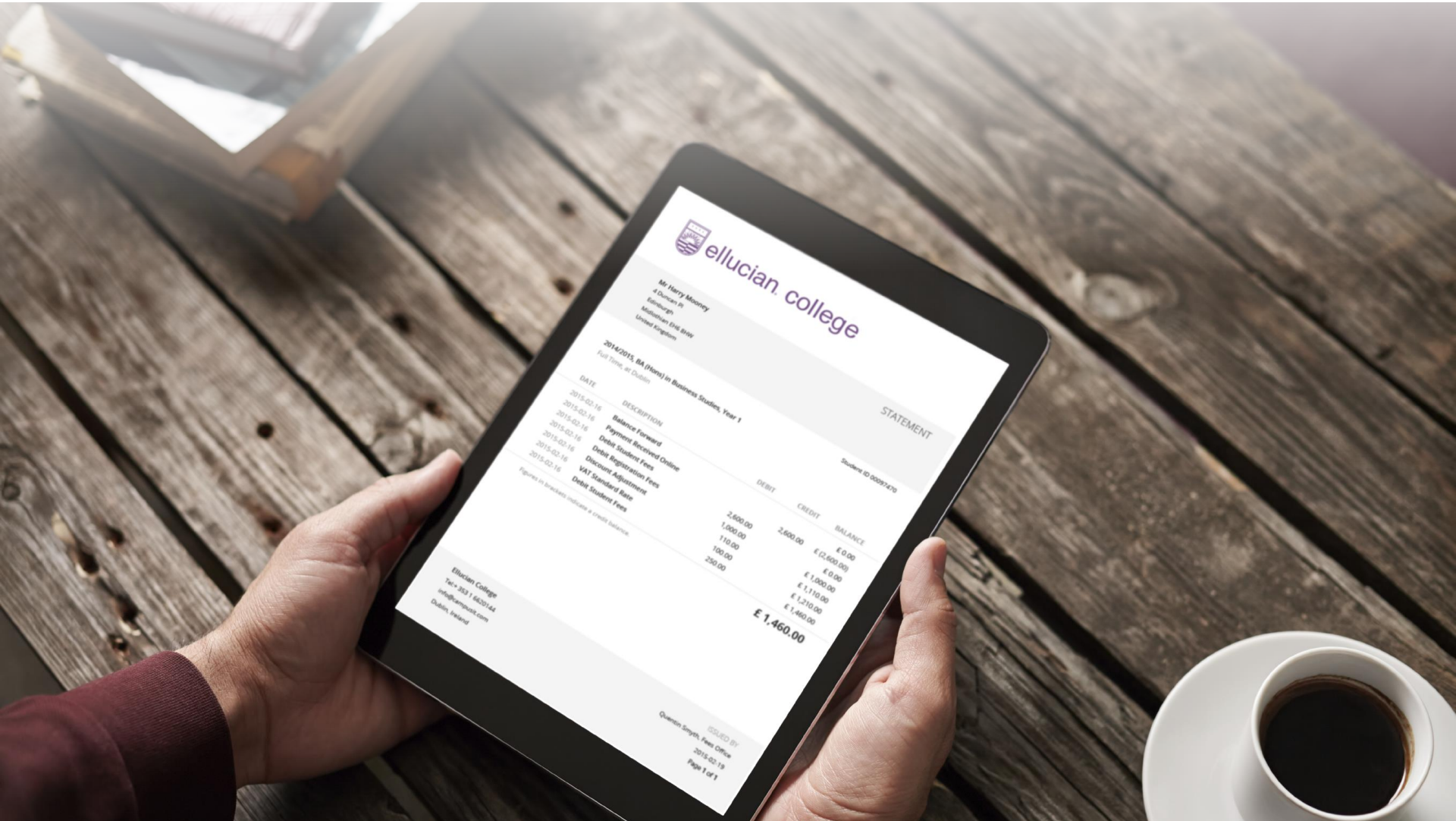


# ELLUCIAN WORKFLOW – POWERED BY ELLUCIAN ETHOS





# ELLUCIAN REPORTING – POWERED BY ELLUCIAN ETHOS



# ELLUCIAN MOBILE – POWERED BY ELLUCIAN ETHOS

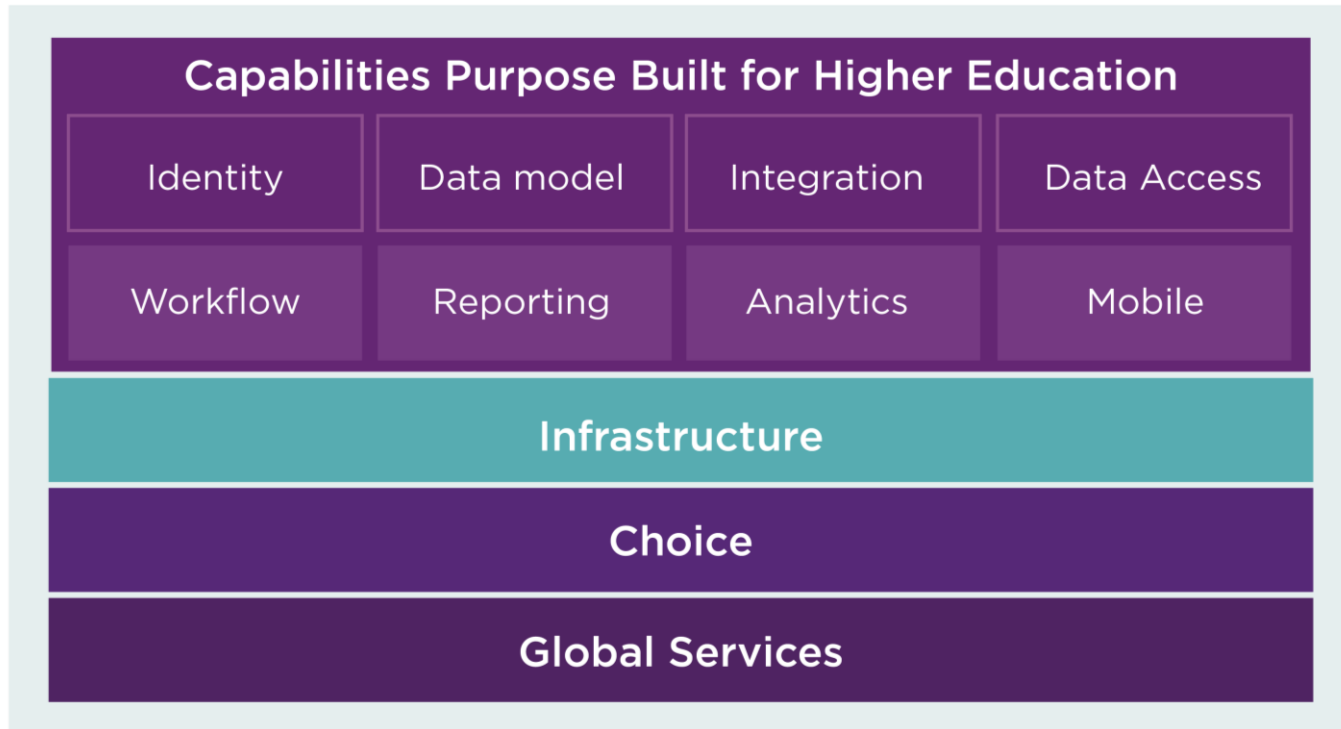
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## Live and work on your terms

- when you want
- with whomever you choose
- on whatever you need

# ELLUCIAN ETHOS PLATFORM – INFRASTRUCTURE

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# ELLUCIAN CLOUD - SCALE AND PERFORMANCE

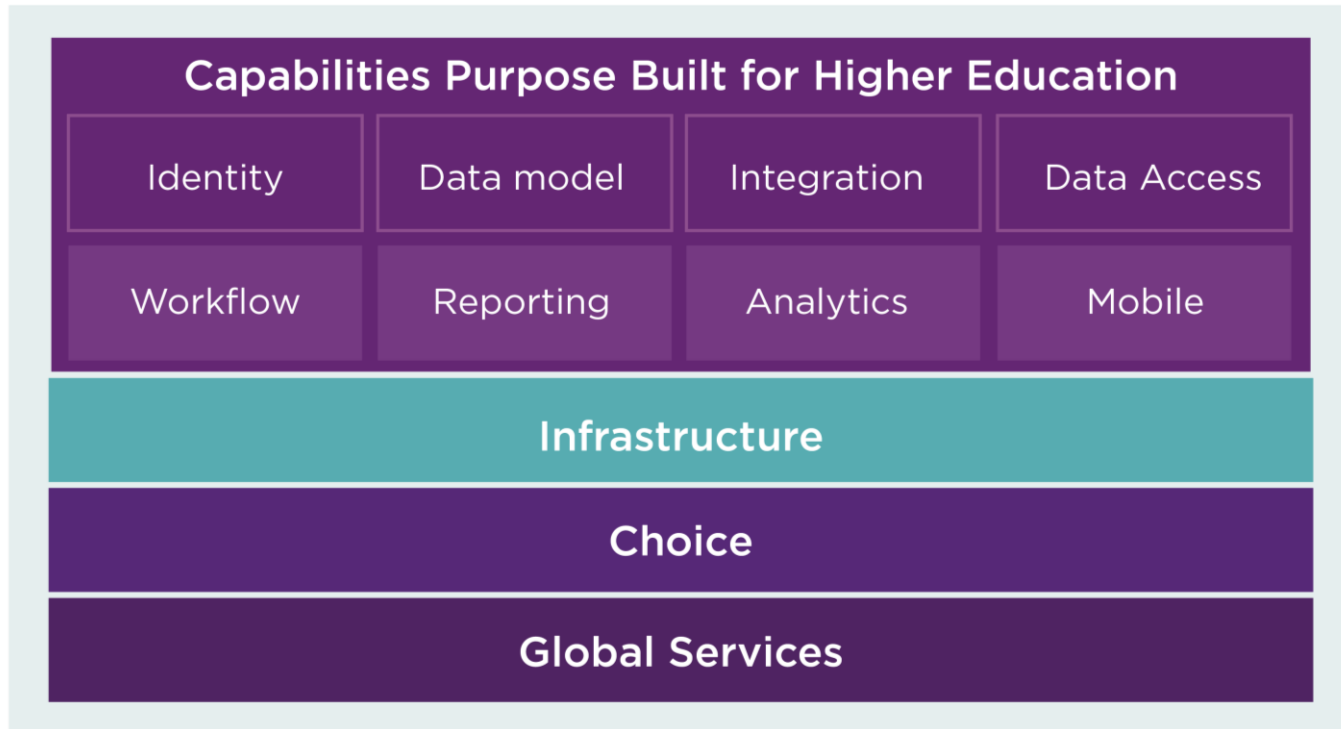
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ellucian.  
Applications



# ELLUCIAN ETHOS PLATFORM – CHOICE

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# Why Cloud?

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Choice

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Innovation without disruption

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Security

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Acceleration

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Lower TCO

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# CHOOSE THE DESTINATION THAT BEST MEETS YOUR NEEDS



100% Software as a Service



On-premise & hosted w/ SaaS extensions



On-premise with SaaS extensions



100% On-premise

# THE ELLUCIAN CLOUD TODAY

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## Today supports:

- ✓ Private Cloud
- ✓ Recruitment
- ✓ Student Success
- ✓ Continuing Education
- ✓ Transcripts
- ✓ Mobile
- ✓ CBE/LMS

## By end of 2016:

- + HR
- + Finance
- + Student
- + Financial Aid
- + Advancement CRM
- + Analytics
- + Many others...

A photograph of three people in a modern office setting. An older man with grey hair and glasses, wearing a dark sweater, sits on the left side of a wooden table, looking towards the other two people. In the center, a man with dark hair and a beard, wearing a blue blazer over a checkered shirt, sits with his hand to his chin, listening. On the right, an older woman with short grey hair and glasses, wearing a pink shirt, sits with her hands raised in a gesturing motion, speaking to the others. The table has papers and a calculator on it. Large windows in the background let in bright light. A large pink circle is overlaid on the left side of the image, containing the text.

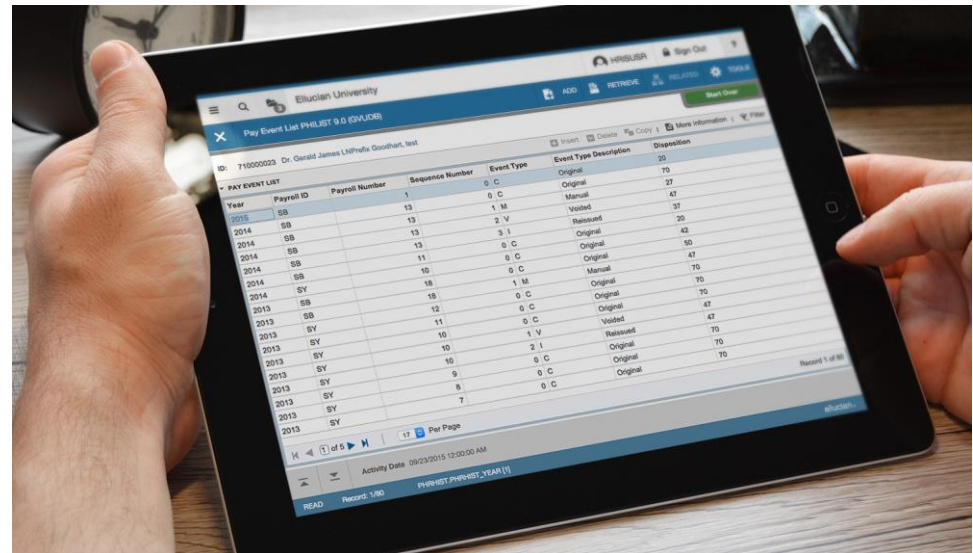
Evolving with XE...  
Let's Do this Together

# Ellucian XE Benefits

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## What Adopting XE for Banner Means to You

- ✓ New Functionality
- ✓ Improved Navigation
- ✓ Consolidated Self-Service Data
- ✓ Responsive Design
- ✓ Custom look and feel without custom code maintenance
- ✓ Reduce Total Cost of Ownership
- ✓ No Reimplementation





# XE Guide is Available at [www.ellucian.com/xeguide](http://www.ellucian.com/xeguide)

1. Plan XE Deployment
2. Analyze Your Modification
3. Get current with Banner
4. Enable Single Sign-On
5. Communicate, Test & Train

The screenshot displays the Ellucian XE Guide website. At the top, a horizontal timeline with five steps: Plan Your XE Deployment, Analyze Your Modifications, Get Current with Banner, Enable Single Sign-On, and Communicate, Test, and Train. Below the timeline, the text reads: "Mobile. Simple. Flexible. That's the vision behind the Ellucian Extensible Ecosystem (or simply, 'XE'). Institutions should be able to extend, configure, and add solutions as campus needs evolve—and do so without sacrificing existing investments." Below this, a paragraph states: "This site is your interactive guide to tracking your institution's progress. Check the 'Step Completed' box at the bottom of each page as you progress and it'll be here for you when you return." Another paragraph follows: "This site is your one-stop-shop for deploying XE applications. Ellucian's XE strategy makes it easier and more efficient for institutions to implement, manage, and extend our solutions. This innovative strategy supports improved functionality, better integration, more agile development, expanded points of access for users, and innovative delivery methods. But don't take our word for it, here's what other institutions have to say:"

Below the text, there are three main sections:

- Surprisingly easy**: A video player showing Kristy Elliott, Ellucian XE Evangelist, speaking. Below the video, it says "Aims Community College talks about XE".
- Moving to XE for Banner**: A purple banner with the text "Moving to XE for Banner" and "Understanding the C". Below it, it says "Kristy Elliott, Ellucian XE Evangelist, April 4, 2016".
- Available XE Applications**: A red button.

Below these sections, the text "Why XE?" is visible.

On the right side, there are two buttons: "Get Started" and "Learn More". Below "Learn More", there are three links: "XE Strategy for Banner Overview", "What's new with Banner (PDF)", and "Banner XE Overview (PDF)".

Below the main content, there is a section titled "Analyze Your Modifications". It contains the text: "We've customized. What's next? Are customizations or modifications in your existing environment hindering you from installing more current releases?" and "Oracle Forms Modifications". It then states: "We have provided functionality to automatically analyze your Oracle Forms modifications to assess the level of effort to turn the modifications into Banner page extensions. In addition, the assessment process will evaluate the level of effort to transform your net new, self-developed Oracle Forms into Banner pages. Please use the Upload Modified Code button in the upper right hand corner to upload a zip file containing your Oracle Forms (.PDB) files. We will create an estimate of effort report that you can access here for review (you'll be notified by e-mail when the report is available)." It then lists the current Banner Oracle Forms releases since:

- Accounts Receivable 8.5
- Advancement 8.7
- Finance 8.8
- Financial Aid 8.23
- General 8.7
- Human Resources 8.9
- Student 8.8

It then states: "In addition, as with any upgrade, Oracle form modifications can be analyzed against new functionality and potentially sunset through the implementation of the new release. If you need assistance with this process, we're happy to help. Please complete a few questions **about your modifications** and we will be in touch with more information."

On the right side of the "Analyze Your Modifications" section, there is a button "Upload Modified Code". Below it, it says: "You may upload .zip files of your modified Oracle form code (or net new form code). Ellucian will then automatically assess the estimated effort to transform your modifications into extensions to the Banner pages, or net new pages. In case of net new forms, you will be notified by email once the assessment report is posted." It then states: "We are now assessing modifications for Banner Oracle Forms releases since:"

- Accounts Receivable 8.5
- Advancement 8.7
- Finance 8.8

You don't have to take my word for it...



Banner® Student Advising with XE

Highlights Dean of Curriculum,  
Professor of Psychology and  
Professor of Chemistry talking  
about benefits of Student Advising  
improvements with XE.

<https://youtu.be/Qq6no9nycQQ>



Faculty Grade Entry with Banner® Student

Highlights Dean of Curriculum,  
Professor of Psychology and  
Professor of Chemistry talking  
about the ease of grading with new  
UX thanks to XE.

[https://youtu.be/seM1J9\\_6EyU](https://youtu.be/seM1J9_6EyU)

Thank you.

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**Mike Bates**

Mike.Bates@ellucian.com

