



Banner Today and Beyond

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Product Manager

Ellucian



Agenda

1 Banner Today

2 Solution Updates

3 Ethos

4 Cloud

5 Stay Connected

Roadmap Framing & Confidentiality

Confidential Information

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Forward Looking Statements

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Banner Today

Breaking Down the Empowered Campus

Maximizing Operational Efficiency

Modernizing core information systems to maximize institutions' return on investment.



Delivering Consumer-Grade Experiences

Lasting, engaging interactions that match the experience constituents have become conditioned to expect in their consumer lives.



Achieving Technology-Driven Agility

Laying an extensible technology foundation that exceeds future demands.



Enabling Institutional Growth

Providing integrated insights and platforms that extend college and university reach.



Empowered campus



The Power of the Ellucian Community

20,000,000

Students served
By Ellucian

50+

Countries

1400+

Banner customers

100+

Running Banner in
the Ellucian Cloud





30+ New Institutions in 2018



State University of New York
College of Environmental Science and Forestry



Misr University
for Science & Technology

Product Management Supporting Banner



**Josh
Dietrich**

Vice President,
Product
Management,
Banner



**Amy
Gaines**

Director,
Product
Management,
Banner



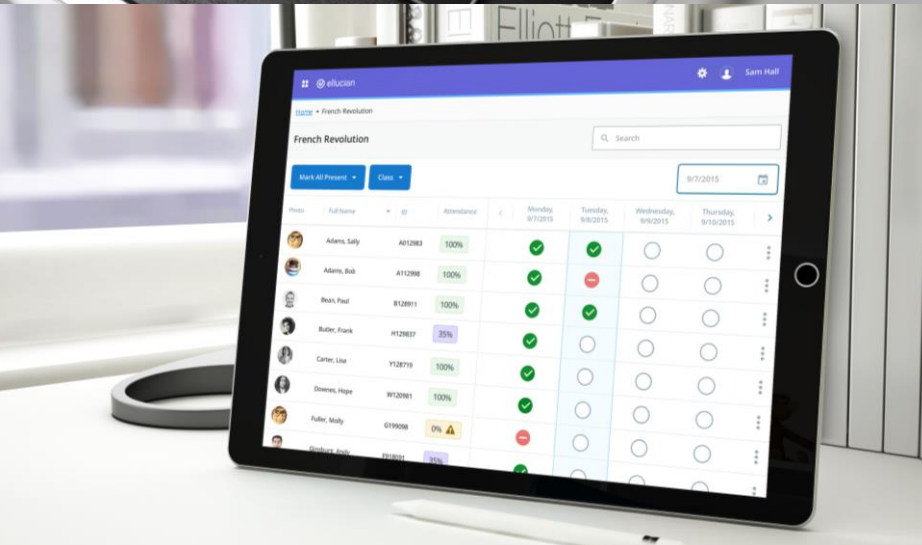
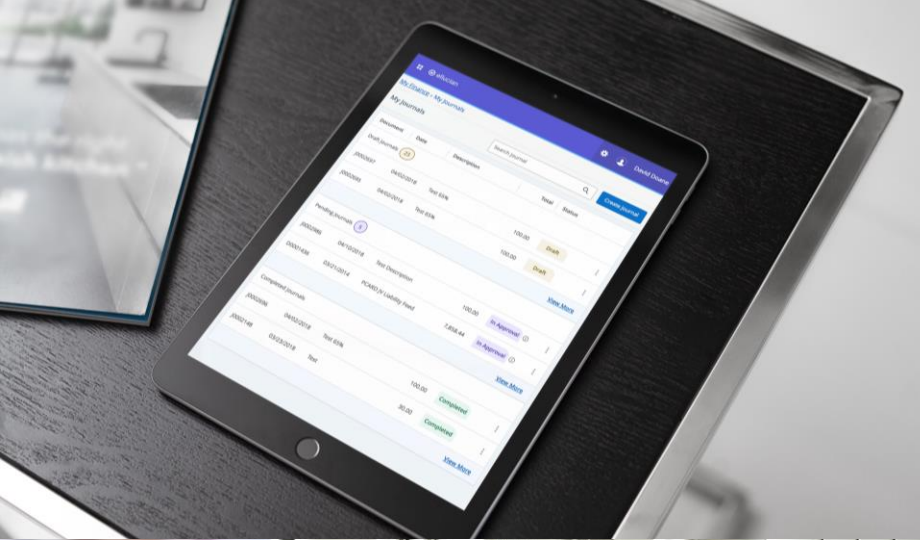
**Laura
Weathersby**

Director,
Product
Management,
**ERP Partner
Applications**



**Zoran
Kovacevic**

Senior Director,
Product
Management,
**Technology
and Platform**



Banner by
 ellucian®

Your Digital Transformation Plan



Solution Updates

Self-Service and Beyond

Self-Service Applications

General Self-Service

Student Self-Service

Faculty Self-Service

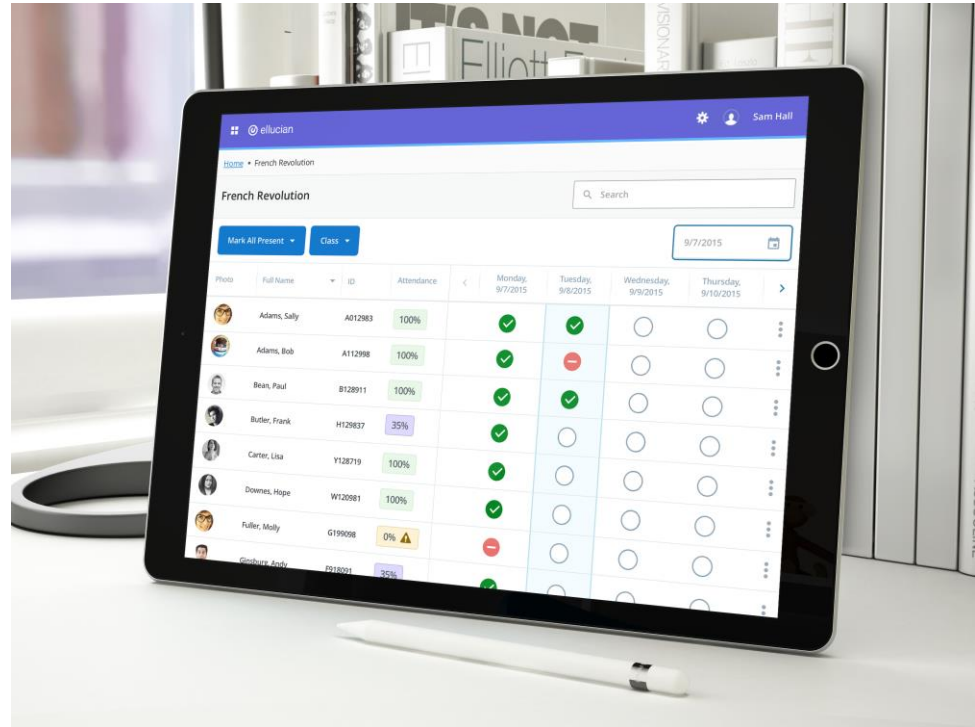
Finance Self-Service

Employee Self-Service

Registration

Communication Management

Event Management



Banner 9 Self-Service Available Today

Student

- Class Roster
- View Grades
- Student Profile
- Advisor Student Profile
- Student Attendance Tracking View
- Student Card
- Drop Roster
- Financial Aid
- Student Aid
- Accounts Receivable

Registration

- Student Registration
- Class Schedule
- Course Catalog
- Registration Status
- Plan Ahead

Faculty

- Attendance Tracking
- Final and Midterm Grades
- Incomplete grades
- Electronic gradebook
- Student Academic Review

General

- Personal Information
- Direct Deposit
- Action Item Processing
- Communication Management
- Proxy Access – Proxy Experience
- Proxy Access – Student Experience

Finance

- My Finance
- My Requisitions
- My Finance Query
- My Journals

Human Resources

- Employee Profile
- Position Description
- Effort Reporting
- Labor Redistribution
- Time Entry & Leave Management

Banner 9 Self-Service Available—Next 12 Months

Student

- Class Roster
- View Grades
- Student Profile
- Advisor Student Profile
- Student Attendance Tracking View
- Student Card
- Drop Roster
- Financial Aid
- Student Aid
- Accounts Receivable
- **Degree Evaluation**
- **Enrollment Verification**
- **Graduation Application**
- **Transcript Request**

Registration

- Student Registration
- Class Schedule
- Course Catalog
- Registration Status
- Plan Ahead

Faculty

- Attendance Tracking
- Final and Midterm Grades
- Incomplete grades
- Electronic gradebook
- Student Academic Review
- **Schedule View**
- **Faculty Feedback**

General

- Personal Information
- Direct Deposit
- Action Item Processing
- Communication Management
- Proxy Access – Proxy Experience
- Proxy Access – Student Experience

Finance

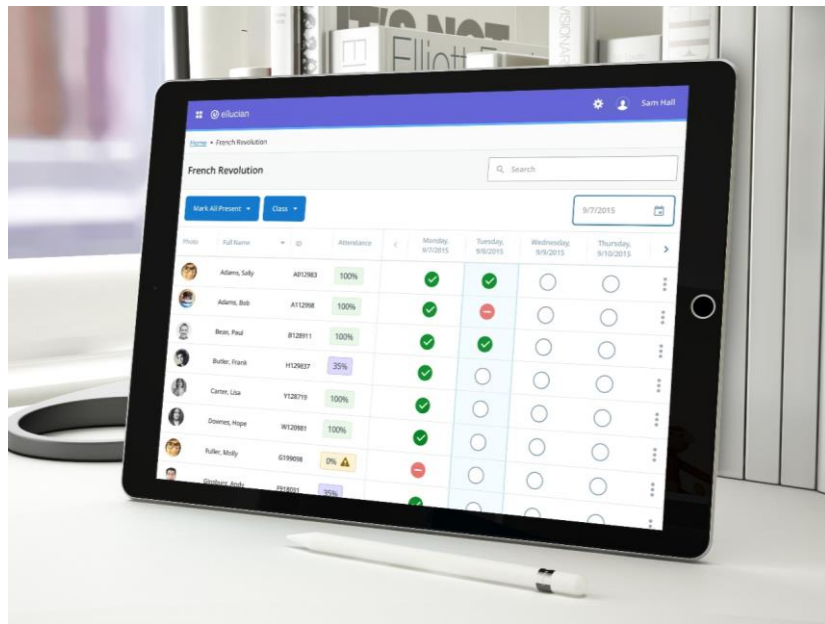
- My Finance
- My Requisitions
- My Finance Query
- My Journals
- **My Approvals**
- **My Budget**
- **My Purchase Orders**

Human Resources

- Employee Profile
- Position Description
- Effort Reporting
- Labor Redistribution
- Time Entry & Leave Management
- **Personnel Actions**
- **Benefits Administration**
- **Salary Planner**
- **Faculty Load and Compensation**
- **Regulatory Tax Pages**
- **Campus Directory**

Banner Student

Roadmap summary



* Customer Focused Updates included quarterly

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2019–2020

Q1 2019

- Action Item Processing Document Upload, Review, and Approve
- Direct Deposit Self-Service Enhancements
- HESA (UK) Data Futures Reporting - Data Structure & UI Enhancements

Q2 2019

- Structured Registration Enhancements
- HESA (UK) Data Futures Reporting - Create HESA Returns in new formats

Q3 2019

- Accounts Receivable Self-Service
- Assign Attributes by Study Path
- User Preferences for Admin

Q4 2019

- Student and Faculty Self-Service Select Release
- HEIMS (Australia) Regulatory Enhancements
- HEA (Ireland) Free Fees Initiative
- eTranscripts Send Enhancements

Q1 2020

- Faculty Self-Service – Faculty Feedback and Schedule View
- Student Self-Service – Graduation Application, Transcript Request, Enrollment Verification, and Degree Evaluation (CAPP)

Student Profile

Feature Highlights

- Single consolidated view
- Same view for advisors and students
- Advisor can add holds or notes to student's record
- Specific links can be added as needed to guide students to information they need



Registration

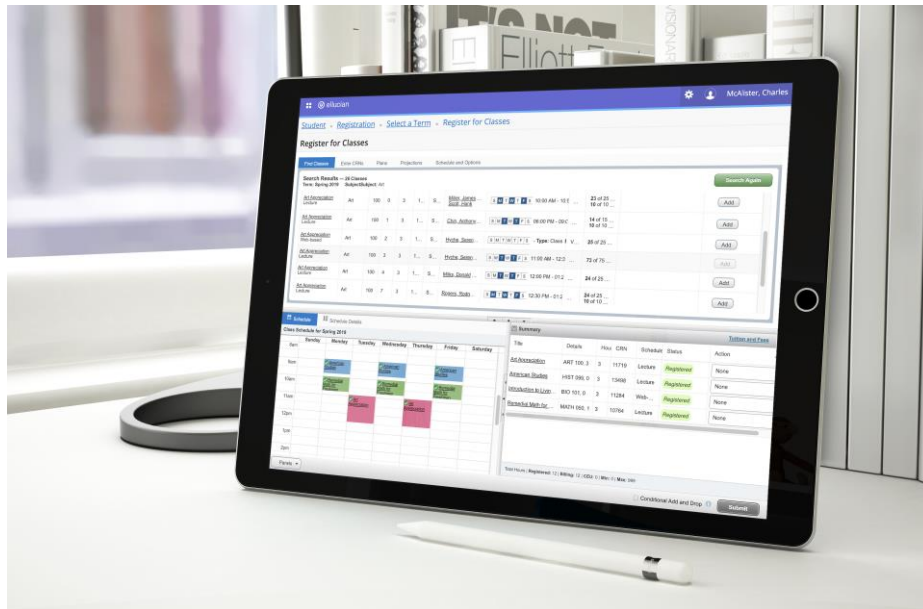
Modern search features

Grid view

Multiple modes

- Search, select and register with Block enrollment
- Structured Registration
- Projected Registration

All support Guided Pathways



Accounts Receivable Self-Service

Feature Highlights

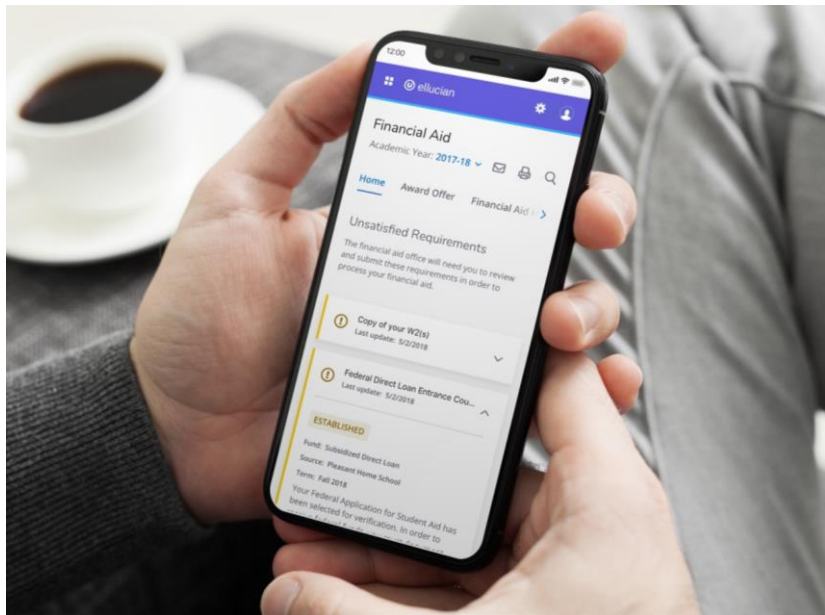
- Mobile-first, responsive design
- Consolidated view of information
- Easier access to payment options

Delivered September 5, 2019



Banner Financial Aid

Roadmap summary



* Customer Focused Updates included quarterly

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2019–2020

Q1 2019

- 2019/20 Pell Schedule
- Federal Shopping Sheet for 2019/20
- COD processing for 2019/20

Q2 2019

- California FA Regulations
- FISAP Report for 2018/19
- Student Loans Company Regulations (UK)

Q3 2019

- Financial Aid Self-Service
- College Scholarship Service early decision and data load for 20/21
- EDE processing for 2020/21
- Pell Formula 3 Calculation
- IM/FM Calculations

Q4 2019

- California Dream Act data load
- Transfer Monitoring
- Student Universal Support Ireland (SUSI)

Q1 2020

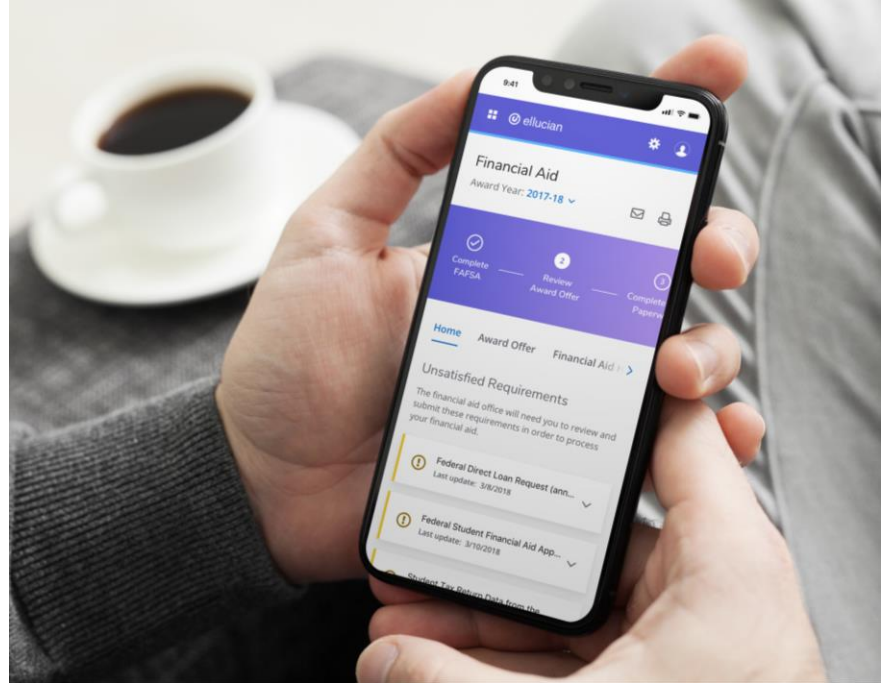
- 2020/21 Pell Schedule
- 2020/21 College Financing Plan
- COD processing for 2020/21
- Student Aid Self-Service

Financial Aid Self-Service

Feature Highlights

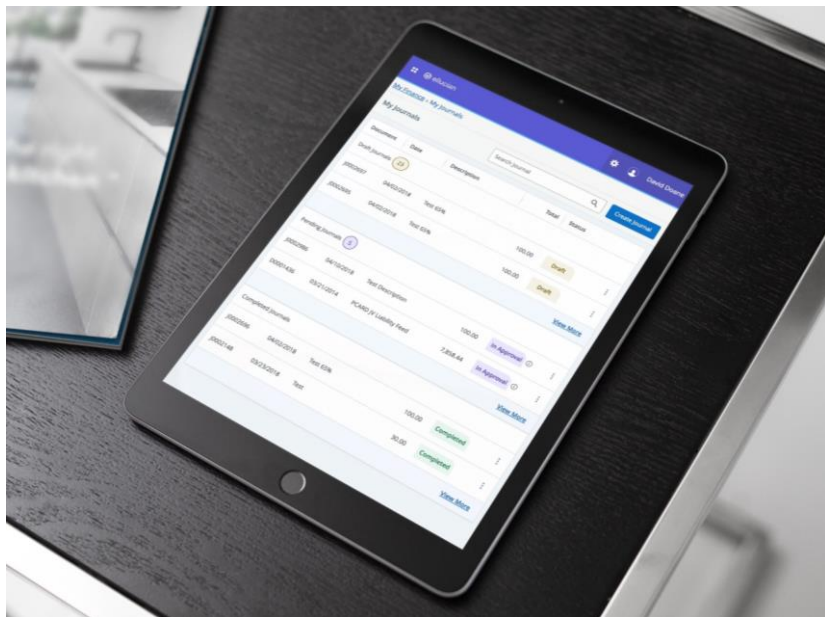
- Consolidated view
- Guided actions
- Highly configurable
- Redesigned award offer

Delivered September 5, 2019



Banner Finance

Roadmap summary



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2019–2020

Q1 2019

- Customer Focused Updates

Q2 2019

- Customer Focused Updates

Q3 2019

- User Preferences for Admin
- Customer Focused Updates

Q4 2019

- Finance Self-Service Select Release
- Customer Focused Updates

Q1 2020

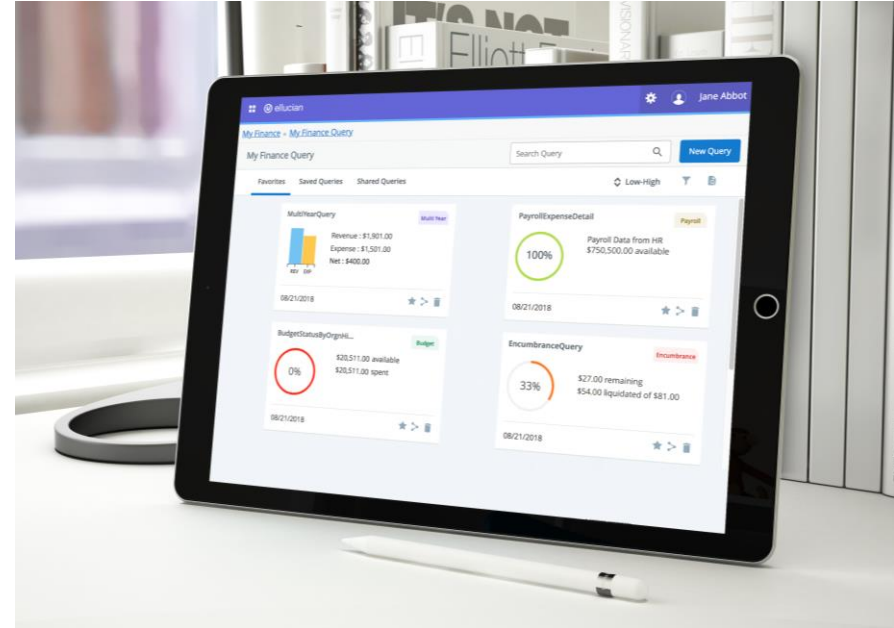
- My Approvals
- My Budget
- My Purchase Orders
- Customer Focused Updates

Finance Self-Service – Available Today

My Requisitions



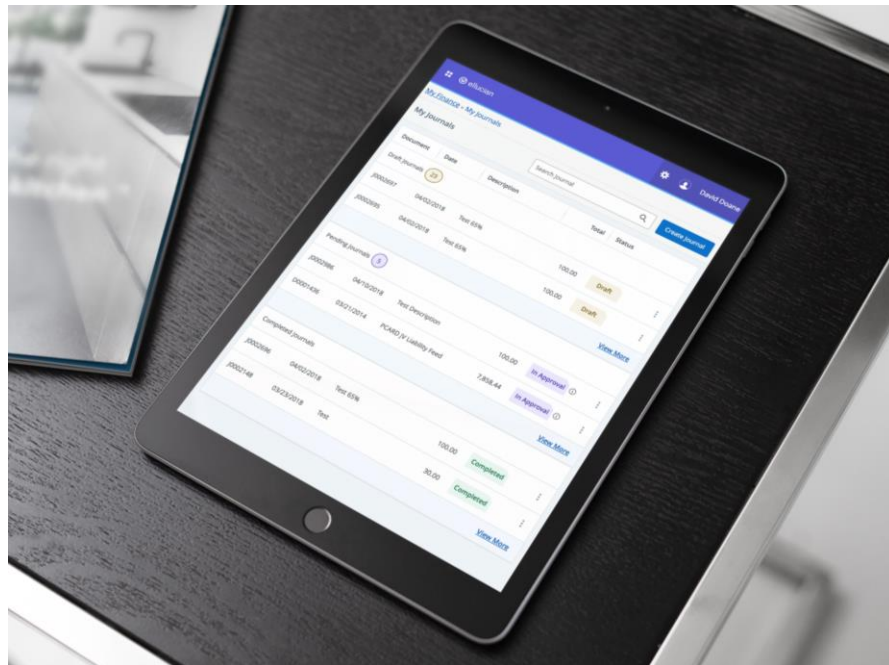
My Finance Query



Finance Self-Service – My Journals

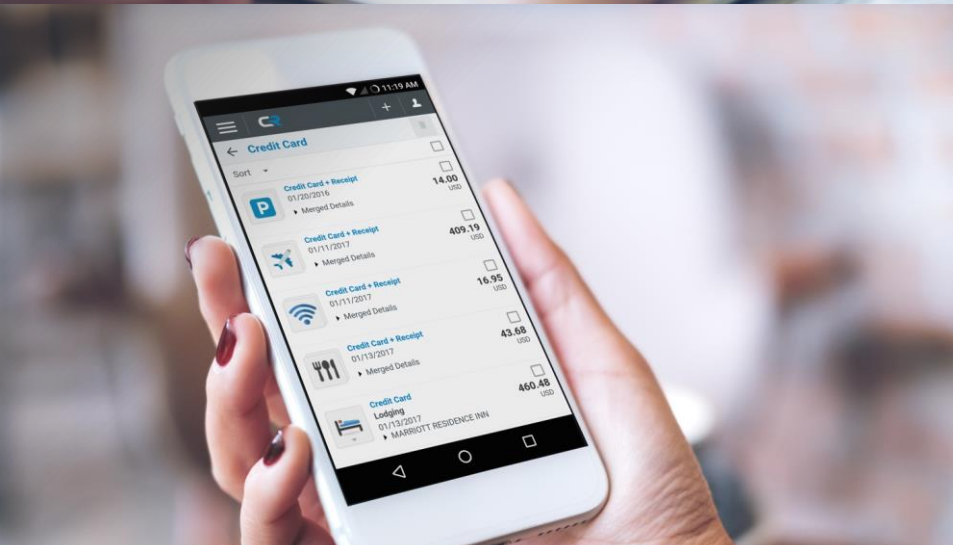
Feature Highlights

- Provides an enhanced user experience and increased functionality for journal voucher processing in self-service
- Supports budget, encumbrance and actual transactions
- Offers dashboard feature to manage journal vouchers at all stages of the lifecycle
- Offers functionality to copy, reverse and delete journal vouchers
- Robust capability without limitation





Spend Management
by Chrome River



Banner Human Resources

Roadmap summary



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2019–2020

Q1 2019

- Direct Deposit Self-Service Enhancements
- Customer Focused Updates

Q2 2019

- Customer Focused Updates

Q3 2019

- Time Entry and Leave Management Self-Service Enhancements
- User Preferences for Admin
- Customer Focused Updates

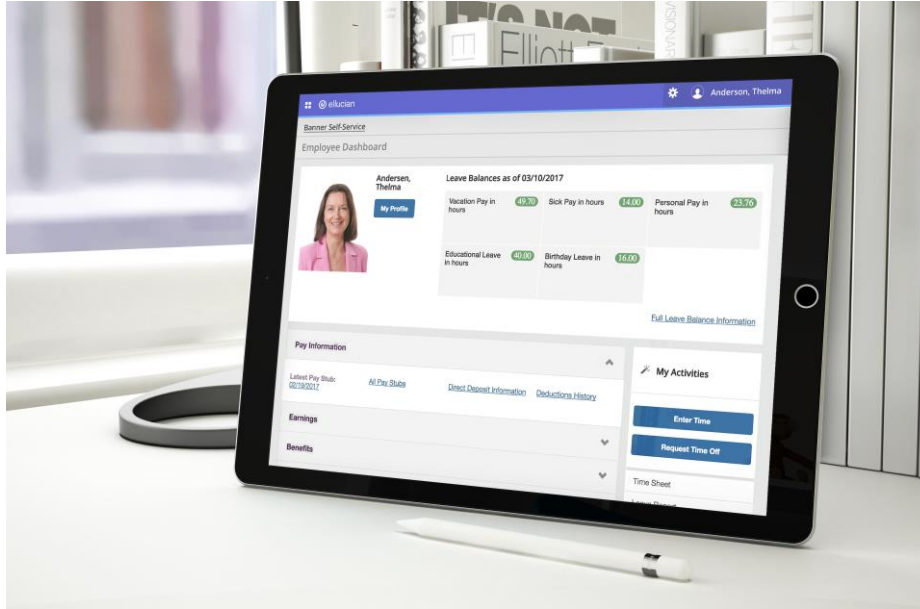
Q4 2019

- Employee Self-Service Select Release
- U.S., Puerto Rico, and Canada Year End Regulatory Updates
- Customer Focused Updates

Q1 2020

- Personnel Actions Self-Service
- Benefits Administration Self-Service
- Salary Planner Self-Service
- Faculty Load and Compensation Self-Service
- Regulatory Tax Pages Self-Service
- Campus Directory Self-Service
- Customer Focused Updates

Employee Profile



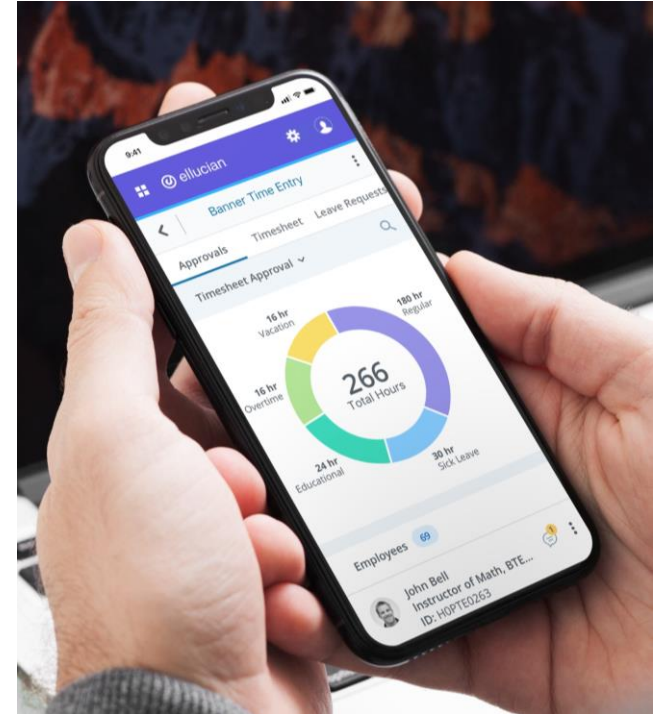
Feature Highlights

- Dashboard to personal, employment and job-related information
- Supervisor view of team information
- Main access to 9.x and 8.x self-service applications
- Configurable
- Mobile-ready

Time Entry and Leave Management

Feature Highlights

- Configure time in/out or clock in/out intervals
- Prevent employees from approving their own time documents
- Selection of approver when multiple incumbents exist or there are vacancies
- Provide notifications to employees and approvers of the need to enter time, correct time, and/or approve time
- Monitor employees with multiple jobs and prevent overlapping work hours across their time sheets
- Modify or remove previously submitted leave requests for the same time period once approved





Talent Management
by Cornerstone

ellucian

Home Learn Perform Career Recruit IT Content Reports Admin Analytics Org Chart

Candidates

11 TOTAL CANDIDATES | 2 INTERVIEW | 3 OFFER LETTER | 6 REVIEW

Change Status View Resume More No candidates selected

Filters

REQUISITION

☒ Show only open reqs

All Jobs
My Jobs

Search requisition

☐ Business Analyst, IT (req1... 3
☐ Seasonal or Part-Time Ins... 1
☐ Assistant Professor, Psych... 5
☐ Lab Technicians (req119) 1
☐ Part Time/Adjunct Instruc... 1

CURRENT STATUS

☒ Show only active candidates

☐ In Review 6
☐ Interview 2
☐ Offer Letter 3

CANDIDATE FLAGS

Search Flags

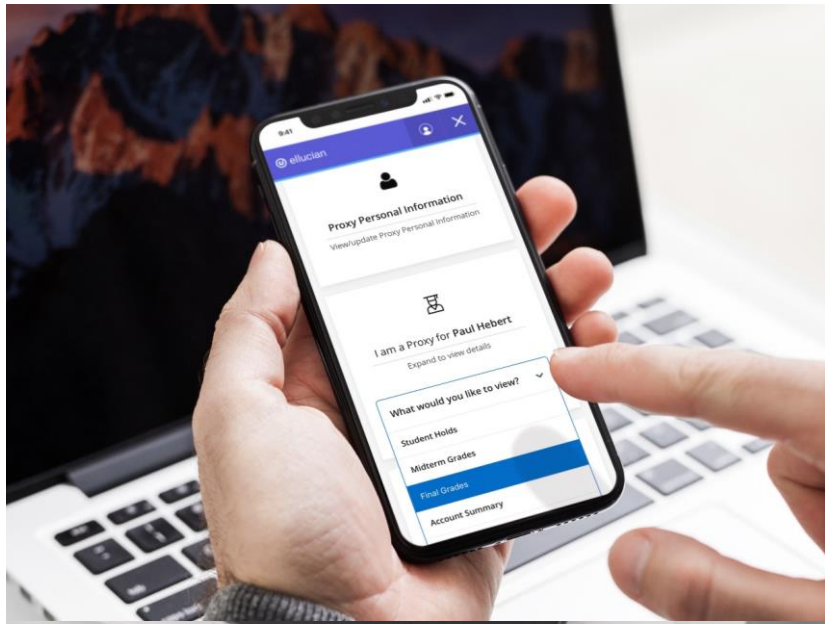
☐ Most Qualified 2

CANDIDATE LOCATION REQUISITION STATUS TYPE SOURCE FLAGS

<input type="checkbox"/> Rick Hubbard Assistant Professor, Victoria University of Wellington 64 4 472 1000 rhubbard@email.com	Auckland New Zealand	Assistant Professor, Psychology req122	In Review 2 hours ago View Feedback	External	Fiji University Career Site 8/29/2018	Most Qual
<input type="checkbox"/> Wanda Medina Internal 212-375-4191 wmedina@email.com	New York NY United States	Business Analyst, IT req138	Offer Letter 19 hours ago No Suggested Action	Internal	Fiji University Career Site 8/28/2018	Most Qual
<input type="checkbox"/> Todd Ramos Lead Programmer, Florida Institute of Technology 8604567845 tramos@email.com	Cantonment FL United States	Business Analyst, IT req138	In Review 19 hours ago No Suggested Action	External	Fiji University Career Site 8/28/2018	Most Qual
<input type="checkbox"/> Wanda Ramos Internal 212-375-4191 wmedina@email.com	New York NY United States	Business Analyst, IT req138	Offer Letter 19 hours ago No Suggested Action	Internal	Fiji University Career Site 8/28/2018	Most Qual
<input type="checkbox"/> Todd Ramedina Lead Programmer, Florida Institute of Technology 8604567845 tramos@email.com	Cantonment FL United States	Business Analyst, IT req138	In Review 19 hours ago No Suggested Action	External	Fiji University Career Site 8/28/2018	Most Qual

Banner General and Platform

Roadmap summary



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2019–2020

Q1 2019

- Application Navigator Enhancements
- Page Builder – Improved Usability and Feature Enhancements
- General Self-Service Proxy Phase I – Proxy Experience
- Improved Documentation for SAML2 Single Sign-On Configuration
- Communication Management – Recurring Scheduling
- Banner Event Publisher - Performance and Feature Enhancements

Q2 2019

- Ellucian Solution Manager – Expand auto-configuration deployment

Q3 2019

- Banner Access Management
- General Self-Service Proxy Phase II - Student Experience
- Self-Service, Extensibility, and Communication Management Application Grails 3 Upgrade
- Banner Event Publisher – Grails 3 Upgrade and Feature Enhancements
- Application Navigator – Eliminate WebTailor Dependency
- User Preferences for Admin

Q4 2019

- General Self-Service Select Release
- Ellucian Solution Manager

Q1 2020

- Remaining Banner General functionality migrated to Banner 9 Self-Service

Administrative Improvements

Improvements to Date

- Compact Page Layout
- Filtering/Search
- Enhanced Printing
- 50+ Redesigned Pages
- Export Enhancements

What's Next

- User Preferences – ***Delivered!!***
- Ongoing Performance Enhancements
- Usability Enhancements
- User-Defined Colors/Contrast

The screenshot displays the 'Basic Course Information 9.3.7 (Core #88)' interface. The top navigation bar includes the Ellucian logo, the title 'Basic Course Information 9.3.7 (Core #88)', and user-related icons. Below this, a header section shows 'Subject: CM6 03467 TESTING', 'Course: 001', 'Term: 201065', and 'Course Title: Test Course'. A 'Start Over' button is located on the right. The main section is titled 'COURSE DETAILS' and contains various input fields and checkboxes. Fields include 'From Term' (201065), 'To Term' (99999), 'Course Title' (Test Course), 'College' (00), 'Division', 'Department', 'Status' (A), 'Approval', 'CIP', 'Prerequisite Waiver', 'Duration', 'Prerequisite Check Method' (Basic or None, CAPP, DegreeWorks), 'Continuing Education', 'Tuition Waiver', 'Additional Fees', 'Syllabus Exits', and 'Long Title Exits'. A 'Repeat Details' section is at the bottom. The footer shows 'Activity Date: 01/22/2008 10:06:05 AM', 'Activity User: SYSTEST78', and a 'Save' button.

Communication Management

Communications for all persons and non-persons known to Banner

- Financial Aid Award Letters
- Registration reminders
- Employee notifications
- Notification of direct deposit changes

Multiple methods to create populations

Recurring scheduling delivered March 2019

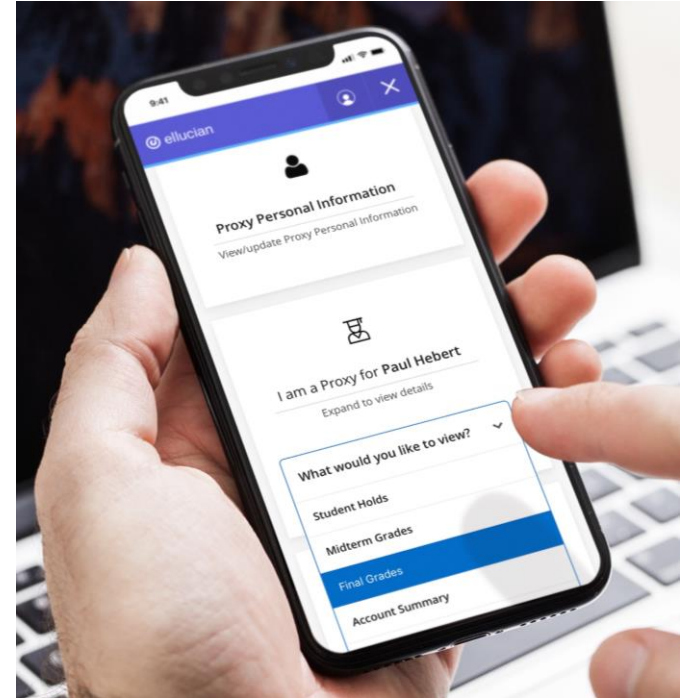


Proxy Access

Phase I – Redesigned Proxy Pages

- Released March 2019
- Financial Holds
- Award History
- Mid-Term and Final Grades
- Course Schedule
- Account Summary
- Link to Institutional Payment Center
- Financial Application Summary Status

Phase II – Redesigned Proxy Assignment (Q3 2019)



Banner Extensibility

Admin Tool

Extend or create
new Banner Admin
Pages

Text Manger

Change user
interface text in
Admin and Self-
Service

Theme Editor

Apply Branding to
Admin, Self-Service
& Application
Navigator

Page Builder

Create Custom
Pages to
compliment Admin
and Self-Service

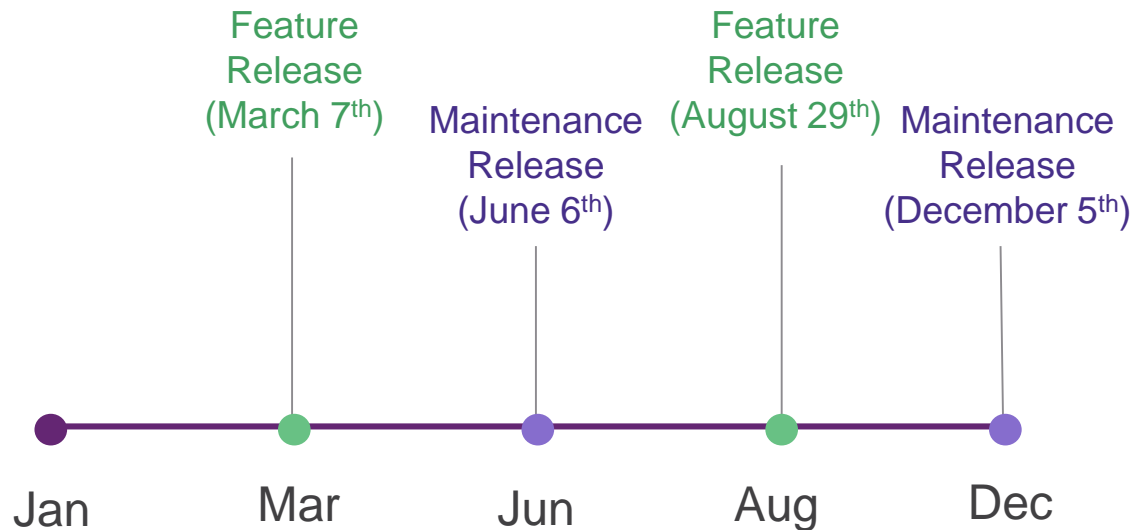
CPC

Extend
Self-Service
Pages

DB Config

Configure Self-
Service and
Application
Navigator

Banner Release Cadence



Details

- **Feature Releases**
 - Includes major enhancements and defect corrections
 - 6 week preview window for SaaS
- **Maintenance releases**
 - Limited to defect corrections and non-invasive enhancements
 - 3-4 week preview window for SaaS
- **Regulatory as needed**
 - Released during normal windows based on regulations
- **Ad Hoc releases**
 - Ad-hoc releases when needed for critical issue resolution

Self-Service Next Steps

Admin Got You Started

- ESM
- SSO
- AppNav

Quick Wins

- Student Profile
- Employee Profile

Transform the Registration Experience

Don't Wait

Ellucian Ethos

ETHOS PLATFORM



WORKFLOW

processes with no boundaries



ANALYTICS

turning data into knowledge



EXPERIENCE

a content driven world



DATA MODEL

starting with a common understanding



EXTENSIBILITY

bring your data together



WEB SERVICES

creating open connections



INTEGRATION

orchestrate the flow of information



CAMPUS APPLICATIONS

across all technology vendors on campus



Human Resources



Health Services



Residential Life



Transportation



Meals



Bookstore



Finance



Student Services



Advancement Office



LMS



The Ethos Community



940⁺

Ethos Tenants

1300⁺

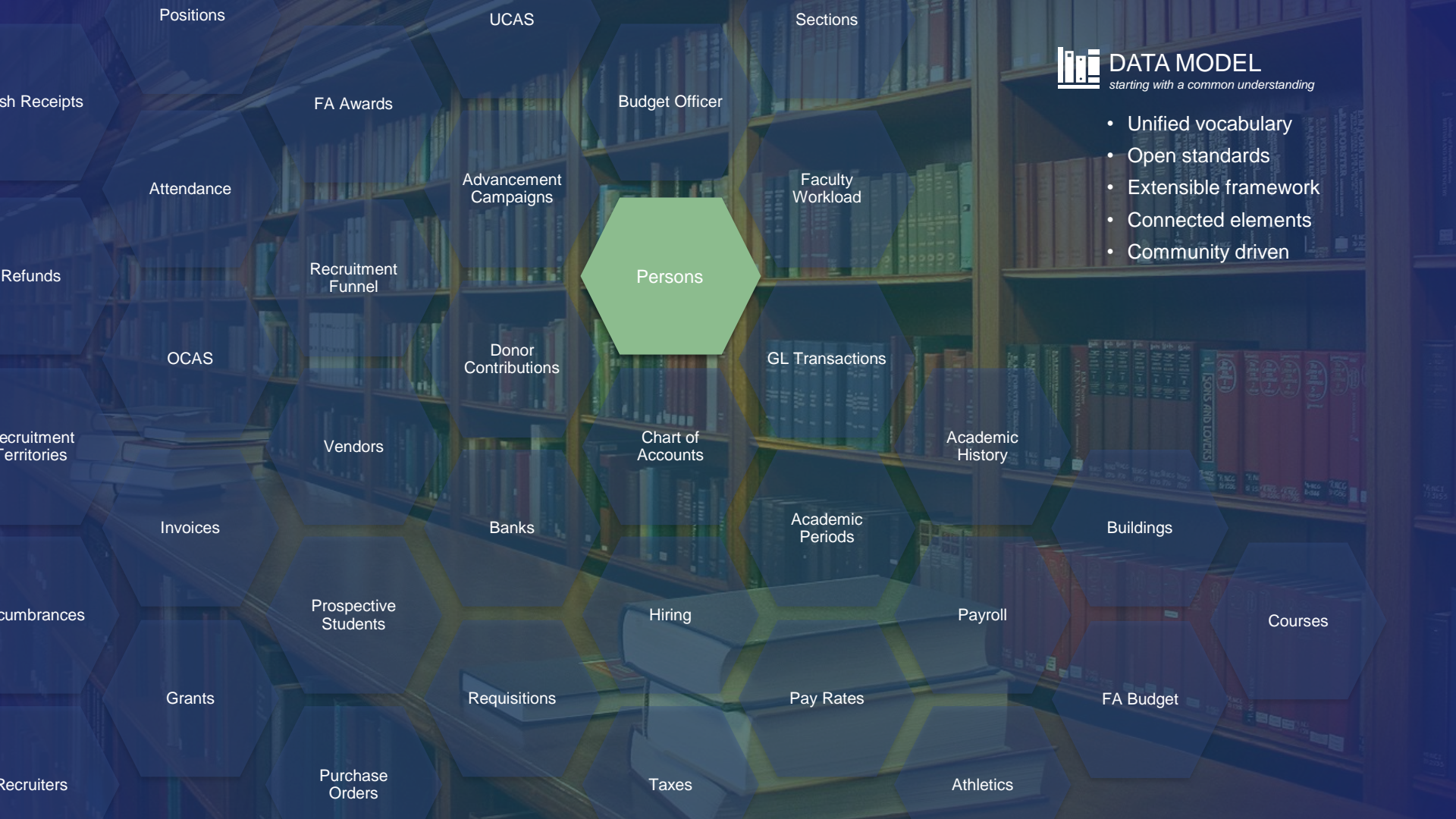
Applications
Connected

1billion⁺

Messages through Ethos
Integration

76⁺

Partners Engaged



DATA MODEL

starting with a common understanding

- Unified vocabulary
- Open standards
- Extensible framework
- Connected elements
- Community driven



INTEGRATION

orchestrate the flow of information

- Hub & Spoke
- Loosely-coupled
- Resilient to change
- Standards-based
- Messaging-based
- Service & data reuse
- Configurable





- Personalize vs. Modify
- Shared data structures
- Designed for the enterprise
- Standards-based
- Service & data reuse
- Configurable

eflucian jwiley@eflucian.me

Back Academic Catalogs Source

Overview

Need help? Visit [Ethos Resource](#) to learn more about properties.

Data Model Title
Academic Catalogs

Data Model Name
academic-catalogs

Data Model Description
A catalog listing of the courses offered by an organization.

Properties

ID	🔒
Title	🔒
Description	🔒
Code	🔒
Start Date	🔒
End Date	🔒

eflucian jwiley@eflucian.me

Back Academic Catalogs Source

Overview

Need help? Visit [Ethos Resource](#) to learn more about properties.

Data Model Title
Academic Catalogs

Data Model Name
academic-catalogs

Data Model Description
A catalog listing of the courses offered by an organization.

Add Property

Title*

Name

Description

☐ Nullable property

Type string String Type none

Min Length Max Length

☐ Add another property

Cancel Add

discovery



planning



development



ready



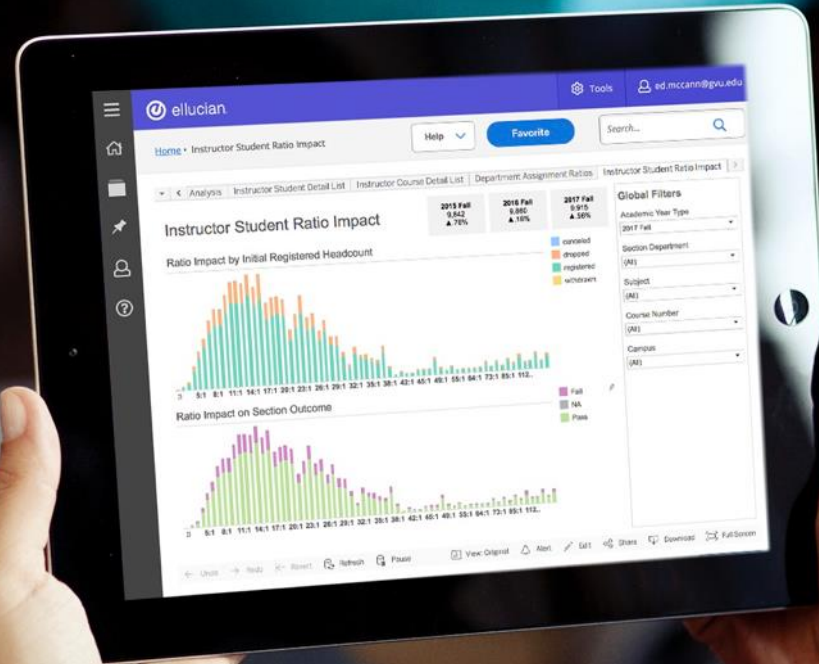
Information presented here is based on Ellucian's knowledge of partner solution availability at the time of publication and is subject to change. Solutions may be in a beta, ready for testing, or GA state and may require implementation services. Customers should contact partners or Ellucian for Ellucian-branded solutions for additional details before making any purchase decision. Customers should contact partners for information on specific applications that are not listed. Integration work may be in progress although timeframes for availability may not have been shared.



ANALYTICS

turning data into knowledge

- Role driven
- Guided discovery
- Modeled by questions
- Your data transformed into knowledge

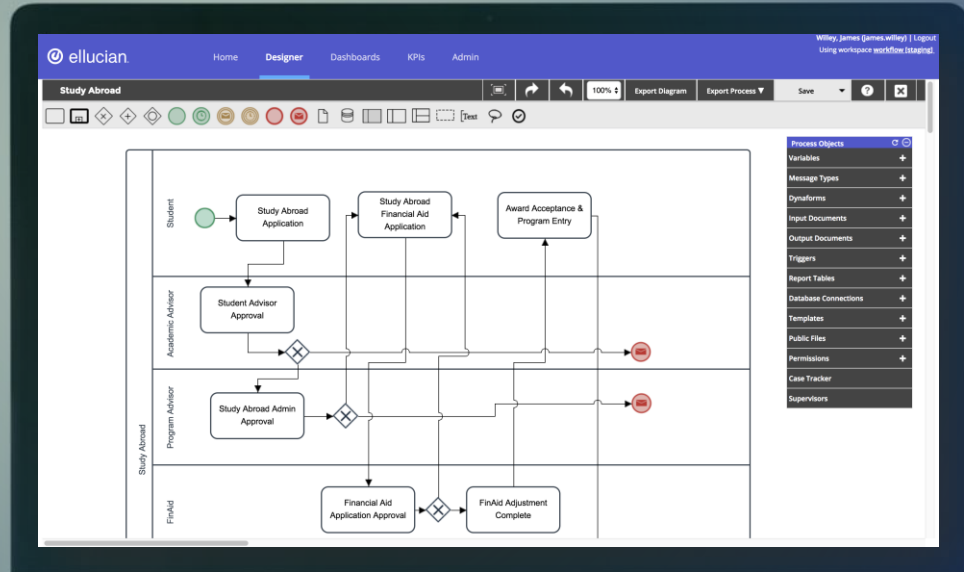




WORKFLOW

processes with no boundaries

- Ecosystem aware
- Event management
- Constituent connections
- Orchestration of processes
- Ethos models in action
- Design based focused

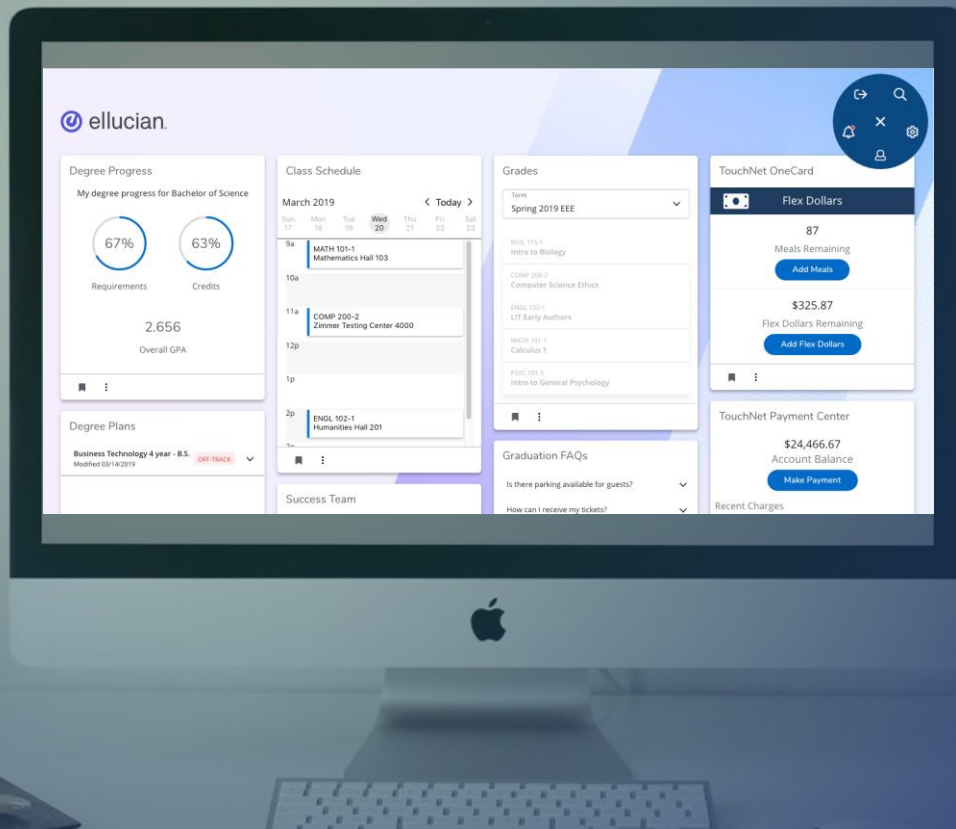




EXPERIENCE

a content driven world

- Focused on user
- Unified standards
- Platform aware
- Connected elements





UNIVERSITY SYSTEM OF GEORGIA

SYSTEM CHOICE



**Leverage Ellucian Ethos
to integrate each school's
ERP system to the
centralized College HOPE
Eligibility Calculation
Service (CHECS) system**

NUMBER OF SCHOOLS

26

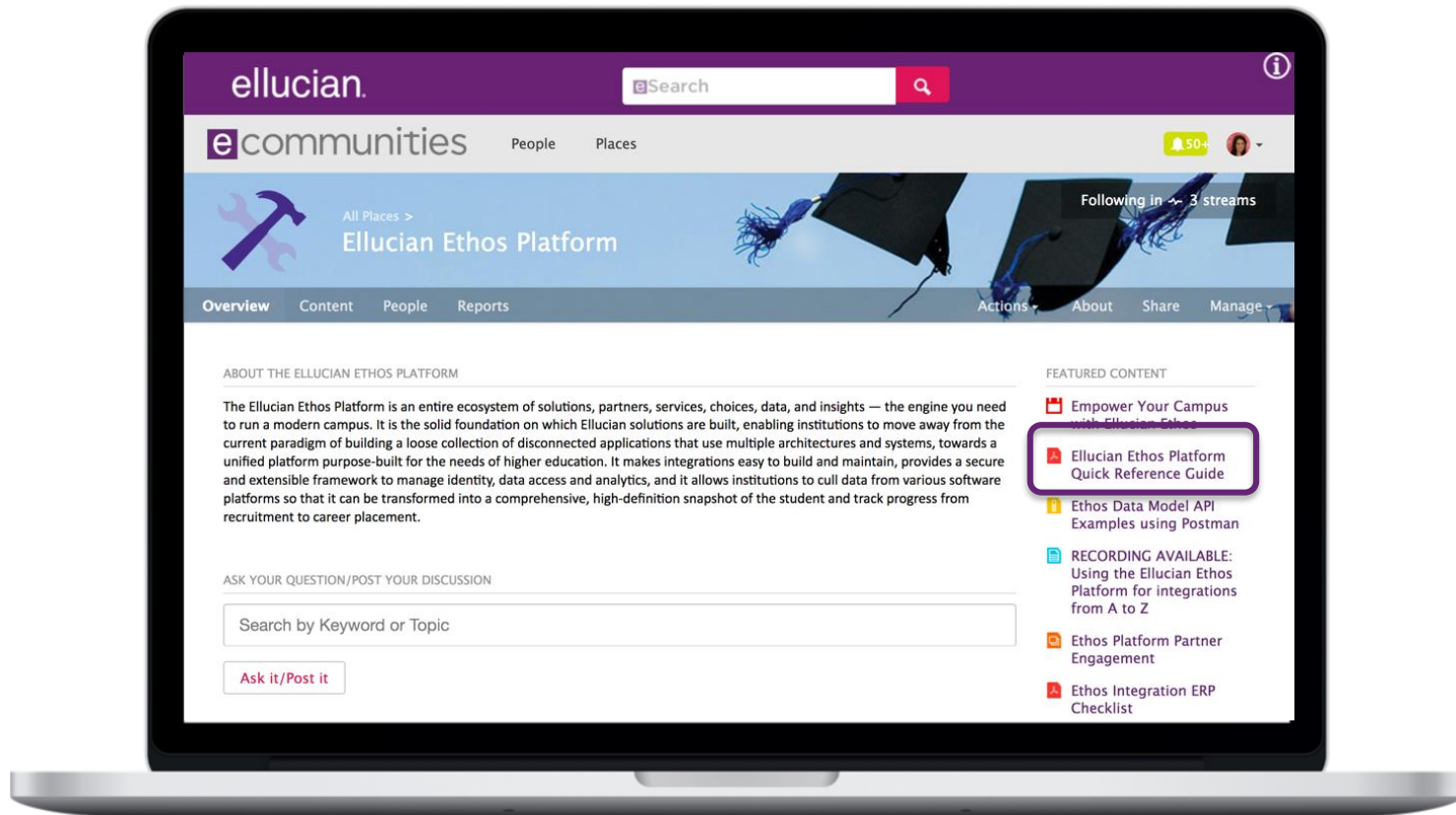
**Live with two-way
integration between Banner
and the Georgia Student
Finance Commission**

OUTCOMES

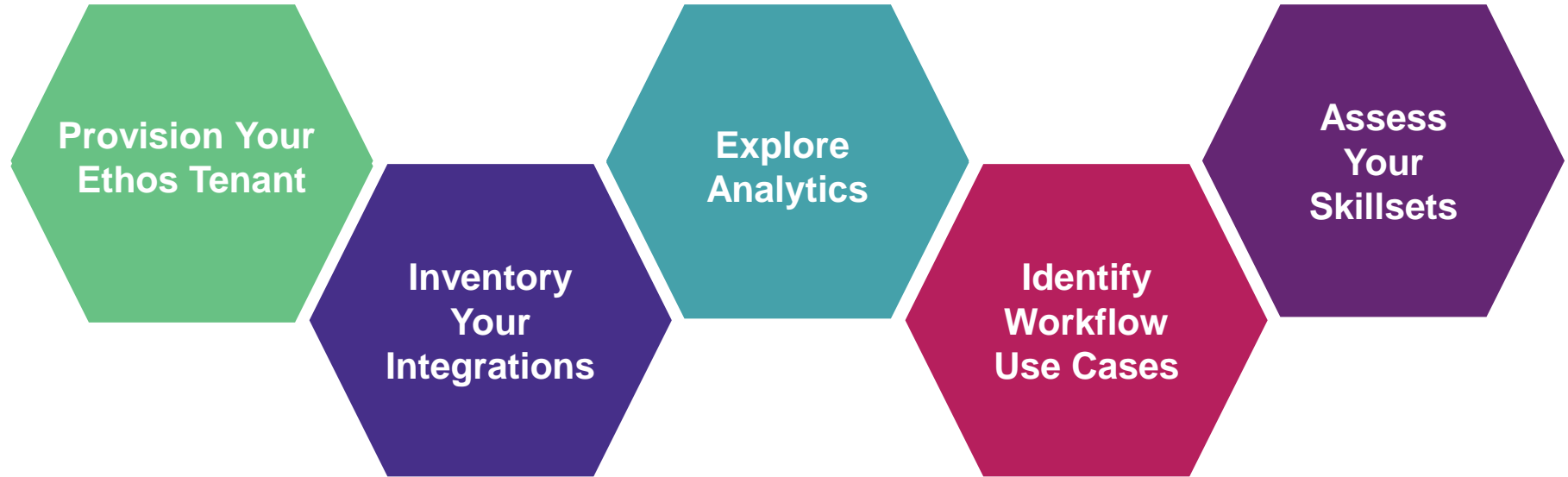
50,000

**Records possible for each
autonomous institution to submit
in real time to scholarship
commission seamlessly
eliminating unnecessary
intermediate steps and state's
technology burden**

Quick Reference Guide



Ethos Next Steps

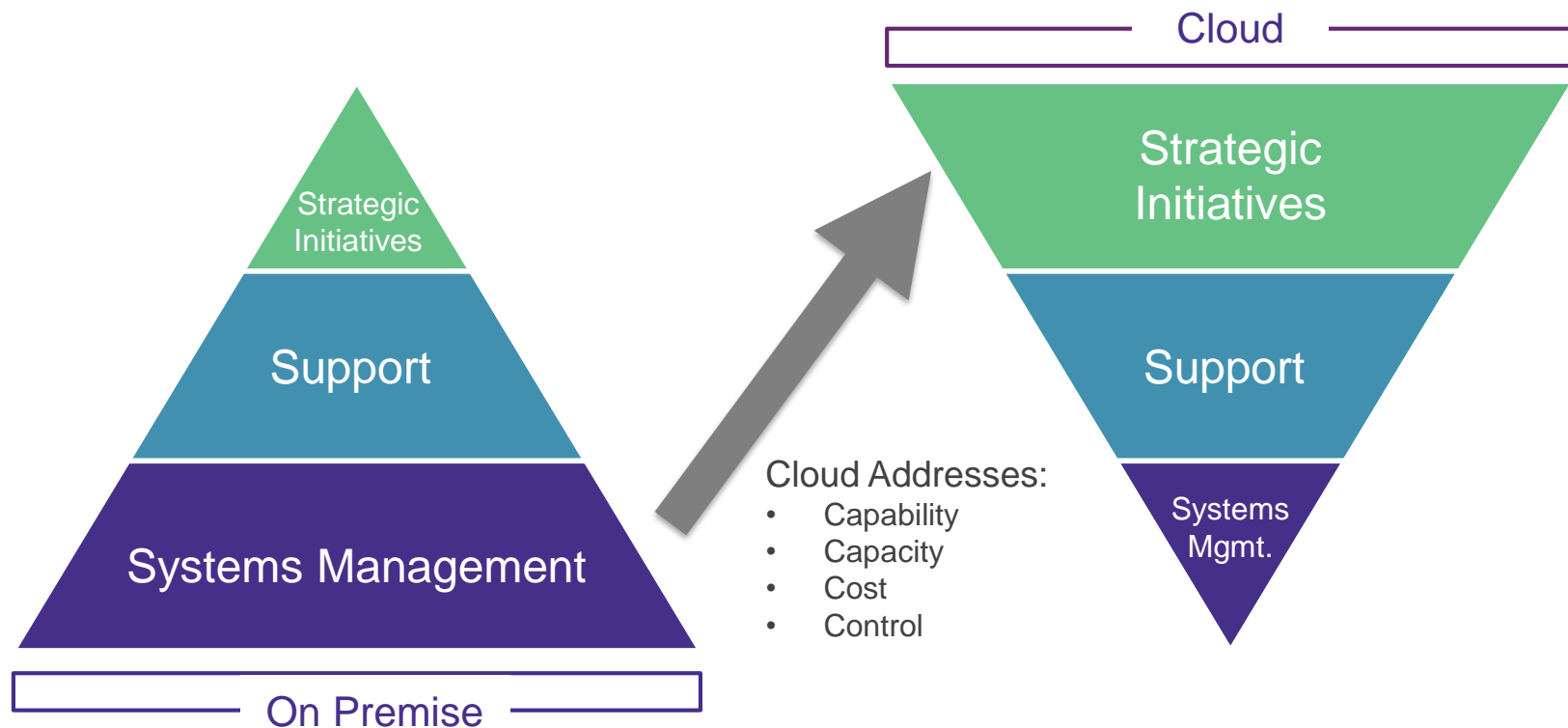




THE HIGHER EDUCATION CLOUD

PRIVATE | HYBRID | SAAS

Cloud Fuels Innovation



The power of the higher education cloud

15+

Years

100+

Running Banner in
the Ellucian Cloud

400+

SaaS

Efficient | Scalable | Flexible | Secure



Flexible Cloud Options



As-a-service

Customer accesses application, data, or service via a public Web portal through a subscription

Benefits

- Current version of software
- Seamless upgrades
- Continuous innovation
- Ability to scale resources



Private cloud

Customer hosts its licensed software in private cloud and accesses through VPN

Benefits

- Agility, mobility, scale, innovation—while maintaining some control over upgrades and modifications
- Security, disaster recovery outsourced to experts, lowering risk
- IT shifts from maintenance to strategic priorities



On premise

Applications and data deployed in on-campus server rooms and managed by on-site IT staff

Benefits

- Complete control over upgrades
- Ability to fully customize applications

Hybrid

On-prem and cloud deployments allows an institution to find the point between agility and control that meets their needs.

“For our institution, Banner was clearly the best software. Banner is a well-evolved system with unmatched functionality and allows for integration with the majority of other products we already use across our campuses. By deploying Ellucian’s SaaS-based software, each of our functional units will be able to better embrace best practices and improve the experience for faculty and students alike.”

Dr. Donnie Grimes, Ph.D., CISSP
Vice President for Information Services
University of the Cumberlands

Get Involved, Stay Connected

Introducing the Customer Center

The screenshot displays the Ellucian Customer Center interface. The top navigation bar is blue with the Ellucian logo, 'Customer Center' title, and links for 'RESOURCES', 'SUPPORT', and 'TOOLS'. On the right, there is a search bar and a user profile for 'Sarah L.' with a menu icon.

The main content area is divided into three columns. The left column, titled 'Discussions I Follow', contains a table of discussions with buttons for 'Create Discussion' and 'View All'. The middle column, titled 'Product Info', lists 'Product Roadmaps' and 'Product Dashboards'. The right column, titled 'Colleague News', shows a list of news items with dates and titles.

Below the 'Discussions I Follow' table is a 'Places I Follow' section, which includes a table of places and buttons for 'View All'.

Title	Author	Latest Activity	Views	Replies	Upvotes	Downvotes
TLS Upgrade for SFMC? Ellucian CRM Recruit	Amanda Roberts	10 minutes ago	12	1	0	7
Educause EAC	Matt Smith	4 hours ago	5	2	0	1
Colleague SAAADMS - Strange code Colleague General and Banner Technical	Theo Poulos	12/5/2018	23	23	10	32
Anyone having issue with the Ellucian search results? Colleague General and Banner Technical	Jamie Battin	11/15/2018	1	0	0	0
Phishing Attack Ellucian CRM Recruit	Elizabeth Taylor	11/14/2018	7	1	1	0


Place	Latest Activity	Members	Followers
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
Product Info
[Product Roadmaps](#)
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Colleague News
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





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News


Ellucian News

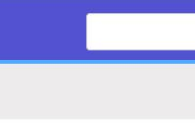
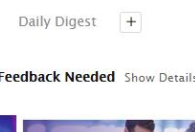
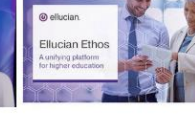

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 **ANNOUNCEMENT: Ellucian Hub Search Experience Feedback Needed** [Show Details](#)




ellucian

Product Roadmaps




ELLUCIAN NEWS





Jamie Battin

in Ellucian News


3 days ago

 **Ellucian Hub Search Experience Feedback Needed**

All, As we continue to make improvements to your Ellucian customer experience one area of focus is search. In 2019 we will deliver enhancements to the Ellucian user experience and your feedback and input is key to the project. Please take few minutes (approx.7) to share your feedback via our online questionnaire. Thanks,

 4
  0

TOP & TRENDING




Josh Dietrich

in Banner General and Banner Technical

2 days ago

FOLLOWING



Steve Kadel

in Banner General and Banner Technical

2 days ago

COMMUNITY GETTING STARTED VIDEOS

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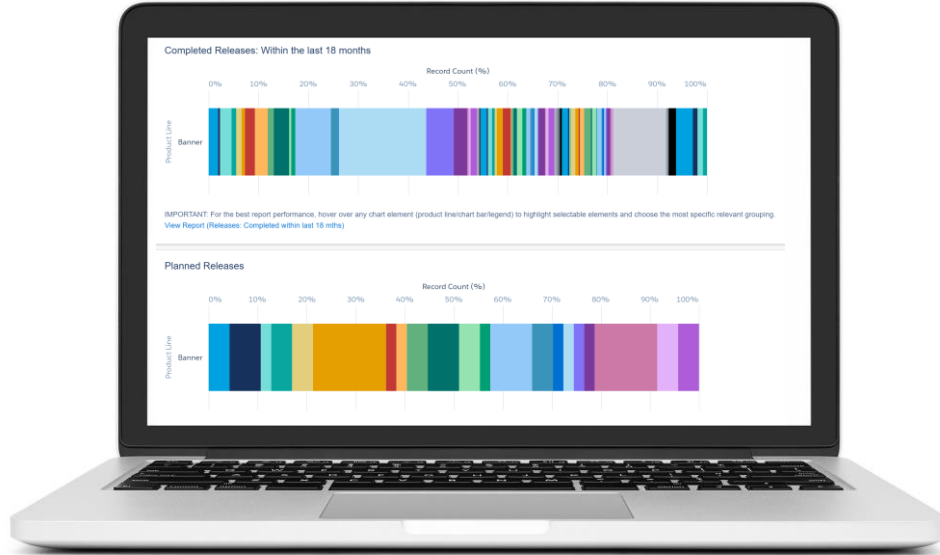
How to Post Content

Create and Update Streams

Instant Email and Daily Digest

Configuring a Mobile Device

Product Calendar Dashboard



Available via the Customer Center

Real-time access to updates

Includes navigation, filter, and search capabilities

Ability to view online and to export for sharing

Shows enhancement, regulatory, patch, and localization release details

Your Digital Transformation Plan





Thank you.

KIMBERLY JOHNSON

Product Manager

kimberly.johnson@ellucian.com