What’s New with Ellucian and the Transformation of Banner® by Ellucian?

Rick Skeel
Director, Product Management
Ellucian
BUGMI September 2015
Agenda

1. Banner Today
2. Ellucian XE: Setting the Stage
3. Acceleration of Banner
4. Future Ready Technology
5. Path to Adoption
Ellucian Extensible Ecosystem (XE)

An innovative strategy grounded in common principles, standards, and services that help us leverage economies of scale across your portfolio.
Redesign and Streamline of Direct Loans

- Ability to keep awards and origination in sync
- Ability to process direct loans by period
- Updated direct loan MPN requirement processing

Scheduled Academic Year (SAY) Setup

- Ability to define multiple SAY codes to differentiate academic year start and end dates for different program calendars
- Ability to update start and end dates for an aid period on RORTPRD

Borrower Based Academic Year (BBAY)

- Ability to package direct loans for “SAY” or “BBAY”
Banner Advising and Student Profile

Single view of the most critical information necessary for students and advisors to make better academic decisions

- Fast and efficient access to pertinent student records
- Reduces training required for advising processes within the institution
“Employee Profile is a modern way of letting employees look at their own data and do their job and they can take it anywhere, because it is configured to work on any device – laptop, tablet and smartphone. Well done Ellucian! I love it. It is so easy to set up even a cave man can do it.”

-University of West Florida
Banner Communication Management

New baseline capabilities to enable tactical and transactional communications

New tools to create, publish, and track constituent communications
Banner Finance Purchase Requisition

“Someone can pick up their phone and use it with hardly any training”
—Usability Testing, February 2015
XE Strategy and Design Principles

XE Design Principles

Usability
Cloud Readiness/Scalability
Configuration over Customization
Extensibility
Features/Functions

Common Architecture

APIs/Web Services/eg eTranscripts

Student/Degree Works
Financial Aid
Advancement
Finance
Human Capital Management

LMS and other third-party systems
WHAT IT MEANS FOR YOU

Outstanding User Experience
Strength at the Core
Extending Campus Environments
Future Ready Technology
Outstanding User Experience
Outstanding Banner Experience
Move to “designed for mobile first”

**Design Principles**

- Anticipate customer needs
- Empower users
- Work everywhere
- Make customers’ lives easier

**Design Strategy**

- All applications should be delivered using a responsive grid layout for the phone, tablet, laptop, and large screen monitors
Strength at the Core
Modern and mobile ready registration experience

Improved academic advising

Global support for multiple registration models

Improved course demand analysis

“We went actually live with Registration for our early registration for the following summer classes and it proved flawless. It worked with no problems and every review we’ve had has been positive.”

-Delano Sweeney, Database Systems Manager, Bluefield State College
Support for 3 Approaches to Student Registration

1. Search, select and register – typically used in North America
2. Projected courses – typically used in Latin America along with #1
3. Structured registration – typically used in the UK/IE/AUS
Banner Academic History & Electronic Gradebook

Improved and modern user experience from grading to graduation processing

Support for Global models

Streamline processes for both administrative personnel and students
Banner Human Resources

Enables greater efficiencies through modern technology

Continues to leverage your specific business rules
Applications Leveraging XE Strategy

Available Application

Banner
- Catalog
- Schedule
- Grade Entry
- Attendance Tracking
- Event Management
- Advising and Student profile
- Registration
- Employee Profile

Ellucian Elevate
eTranscript APIs
Ellucian Mobile
Ellucian Portal
Institutional Performance Management

Applications in Development

Banner
- Academic history, electronic gradebook
- Communication Management
- Position Description
- Purchase Requisition

Banner HR, Position Control,
General Forms Transformation
Banner Finance Forms Transformation
Ellucian Pilot

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Ellucian Mobile – includes mobile registration

Meets students where they live

Registration most requested capability

Global from the start product – Available in Portuguese and Arabic
Ellucian portals

ILP for LMS integration

Ellucian Portal Platform (based on SharePoint)

Ellucian Luminis Platform (based on Liferay)

Colleague

PowerCampus

Banner

Banner
Ellucian Enterprise CRM

Covers the full student lifecycle:
- Recruitment
- Student success
- Advancement

Supplemented by:
- Continuing education / workforce development
Ellucian Enterprise CRM

ELLUCIAN ENTERPRISE CRM

Recruiter  Student Success  Advancement

Ellucian CRM Platform

Enterprise class and higher education specific
Unparalleled integration and interoperability
Extensive technology supports speed to value and minimizes costs
Flexible deployment options

XE

APIs | Web Services

ERP

HR | Finance | Student | Financial Aid | Advancement

Banner  Colleague  PowerCampus

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Ellucian Elevate
Cloud Solution Designed for CE/WFD
Full Range of Analytics Designed for Higher Ed

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**Operational Data Store**

- **ERP**
  - **INFORMING**
    - What happened?
  - Primarily batch and some ad hoc reports

- **ODS**
  - **ANALYZING**
    - Why did it happen?
  - Increase in ad hoc reporting and Information on demand

- **EDW**
  - **OPERATIONALIZING**
    - How should we take action?
  - Dashboards for managers and analysts

- **EDW + Performance Apps**
  - **PREDICTING**
    - What will happen?
  - Data-driven planning and forecasting

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**Enterprise Data Warehouse**

- Managed Reporting
- Ad Hoc Reporting
- Analytics
- Dashboards
- Scorecards and Benchmarking

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**Directing**

- Ability to model, manage, and adapt

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• Platform for establishing and maintaining a data-driven culture of performance
• Affordable & cost-effective software system for end-to-end performance
• Unique, first to market solution
• Ellucian XE—pulls data from various sources
• Aligns action to institutional goals, strategic mission, and managing bottom to top performance
Acceleration of Banner
Modernizing Banner

Administrative Imperatives

• Technology—Eliminate Oracle Forms

• Usability—Consumer web in high productivity mode
Self-service Imperatives

- Usability—Consumer web for casual users
- Rich functionality, evolving with Higher Education
Modernizing Banner

Integration Imperatives

- API-based integrations
- Industrial Strength Superhighways
Target Roadmap Delivery

- Employee Profile: 1H2015
- Human Resources Admin
- Finance - Requisition: 2H2015
- Finance Admin
- Registration self-service
- Student Admin (A/R, Financial Aid, core Student): 1H2016
- Student self-service (modular delivery)
Future Ready Technology
Banner powered by XE – Deployable Applications

Identity Provider (EIS, CAS, etc.)

Application Navigator

Lightweight Web Apps and APIs
- Faculty Grade Entry
- Advising Student Profile
- Employee Profile
- Student Registration
- Human Resources API
- Finance API
- Student API

Transformed Page Modules
- Human Resources
- General
- Finance
- Student (A/R Financial Aid, Student)

Banner Database
Banner Extensibility Strategy

• Eliminate (or at least greatly reduce and simplify) rework associated with upgrades
• Eliminate the need to modify source code, but if necessary, make it easy for continuous integration
• Provide a toolbox
• Make tools simple to use

Application Skinning
Aspect-oriented Programming
Code Repositories and Tools
External Business Rules
Menu Integration
Model Extension
Resource Bundle Editor
Single Sign On
UI Extensions
Changing Banner is Simplified through Extensibility Tools

- Branding, Vocabulary
- Common Extensibility Tools
- Transformed Page Modules
  - HTML5
  - Java
  - Ellucian Libraries
  - Core Libraries and Framework
- Banner Lightweight Web Applications and APIs
  - JavaScript (Backbone/JQuery, AngularJS)
  - Common Ellucian Plugins
  - Grails Web Framework / Groovy

Banner Database
- DBEU
Manager Solution Manager is a no cost software application to help clients manage their environments and the software received from Ellucian. It can help clients provision new environments and automate the Banner upgrade process.
<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Application</th>
<th>Current Installed Release</th>
<th>Latest Available Release</th>
<th>Selected Target Release</th>
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<td>BannerERP</td>
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<td>Banner Financial Aid</td>
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<td>Banner Financial Aid Self-Service</td>
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Ellucian Platform
Our mission is to provide an innovative software platform which accelerates delivery and enables consistency across all Ellucian products.
Ellucian Higher Education Data Model
An easier way to consume data:
Ellucian Higher Education data model

Complexity eliminated
Universal information access
Easy to consume JSON formats

+ Entity: COURSES
  + NAME: ENG101
    – DESCRIPTION: This course is designed to reinforce composition and grammar and it often taken...
      – CREDITS: 3
    + REQUIREMENTS
      - ...
      - ...
  + SCHEDULING
    - ...
    - ...

+ NAME: MTH101
  – DESCRIPTION: This course is...
Ellucian Identity Management Strategy
Identity Management Then

- Ellucian Applications (Banner, Degree Works)
- Client Applications (Custom, 3rd Party)
- Ellucian Applications (Colleague, CRM, Portal)
- Shibboleth
- ADFS
- Directory Server
- 3rd Party Cloud (Bb, Moodle)
- Microsoft Cloud (Office 365, Azure)
- Ellucian Applications (Luminis, Mobile)
Ellucian Identity Service Now

- Ellucian Applications (Banner, Degree Works)
  - CAS
- Client Applications (Custom, 3rd Party)
  - SAML2
- Ellucian Applications (Colleague, CRM, Portal)
  - WS-Federation
- Ellucian Applications (Luminis, Mobile)
  - SAML2
- 3rd Party Cloud (Bb, Moodle)
  - WS-Federation
- Microsoft Cloud (Office 365, Azure)
  - Directory Server

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Benefits of Ellucian Identity Service

• Reduces the complexity of implementing and managing your institution’s identity infrastructure.
• Provides your institution with a wide range of choice with respect to your identity management infrastructure
  o deployment options
  o configuration options
  o protocol support
• Reduces costs of deployment and administration.
• Founded in open source software.
• Adds enhanced value to your institution’s maintenance dollars.
Ellucian Data Integration Strategy
Point to point integration is expensive and brittle
Ellucian Integration Hub

1. New person added in ERP System (e.g. Banner, Colleague)

2. Message published to Hub for any interested subscribers

3. Advancement CRM and Elevate receive notification and process new person
Adoption Path
Path to Adopting XE Applications

1. Run DBEU
2. Review and catalog modifications
3. Establish and deploy an approach for Identity Management
4. Deploy XE Application
Welcome to the XE Guide

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.

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.

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:

Learn More

- What’s new with Banner (PDF)
- Banner Transformation Overview (PDF)
- Texas Tech prepares for future growth with XE (video)

Available XE Apps

Start Process ▶️

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Plan Your XE Deployment

Implementing XE is a simple and straightforward process and there’s no prescribed order for implementing the applications. If you are not sure which application(s) to start with, take a look at the available XE applications. Before you begin, you should check to make sure that your technological infrastructure is optimized for XE. Because each institution is different, you should always validate your hardware sizing through performance testing using a workload representative of your unique situation. The modular architecture of Banner XE enables institutions to determine which applications will be deployed—and at what time. Institutions can choose to deploy Banner XE applications based on institution-specific service delivery requirements. These applications are ready whether you are on the cloud or have an on-premises deployment, and can scale up or down as your needs change.

Because each Institution is different, you should always validate your hardware sizing through performance testing using a workload representative of your unique situation.

Your IT infrastructure must meet a few basic requirements. Below are the prerequisites you should have in place before installing XE applications.

Hardware

The Banner XE architecture reduces the resource requirements from the Oracle database tier, which enables additional room for growth and allows Oracle RAC technology to support higher user loads. This modular deployment allows customers more flexibility when upgrading smaller modules independent of the entire Banner product. This also reduces the dependencies on application upgrades.

Banner XE technology scales horizontally in the application server tier using lower cost commodity hardware, allowing higher performance for increased user loads. The number of applications per application server will vary depending on the applications’ expected concurrent usage, which determines the memory and CPU usage.

Before implementing XE, you must first determine your hardware requirements based on application usage. Our Banner XE Sizing and Configuration Guide will help you determine the appropriate sizing for your environment.

Database Requirements

The XE application supports Oracle Database 11.2.0.2, with:
Places to Find More Information

XE Guide – Adoption help with XE
• www.ellucian.com/xeguide

eCommunities
• Banner community
  • White papers, webinars, documents, etc.
• Banner HR and Banner Finance communities

Roadmaps
• http://www.ellucian.com/Roadmaps/

Download documentation from the Support Center
Attend an Ellucian education class
Contact your Client Partner
Contact us for more information.

ellucian

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