

XE Roadmap and Student Success

USG & Ellucian Partner meeting – July 13, 2013

Presented by: Ed Hauser

Director for Enrollment & Student Services

Jamie Chambron

Vice President * Management Consulting & Education Services

Agenda Slide

- Ellucian XE
- Banner XE & Roadmap
- Ellucian XE Architecture
- XE Applications Available Today
- XE Development Partners
- XE Applications in Process
- Ellucian On-Demand Subscription Library
 - Technical Training Week
- Q & A

Roadmap Framing and Confidentiality

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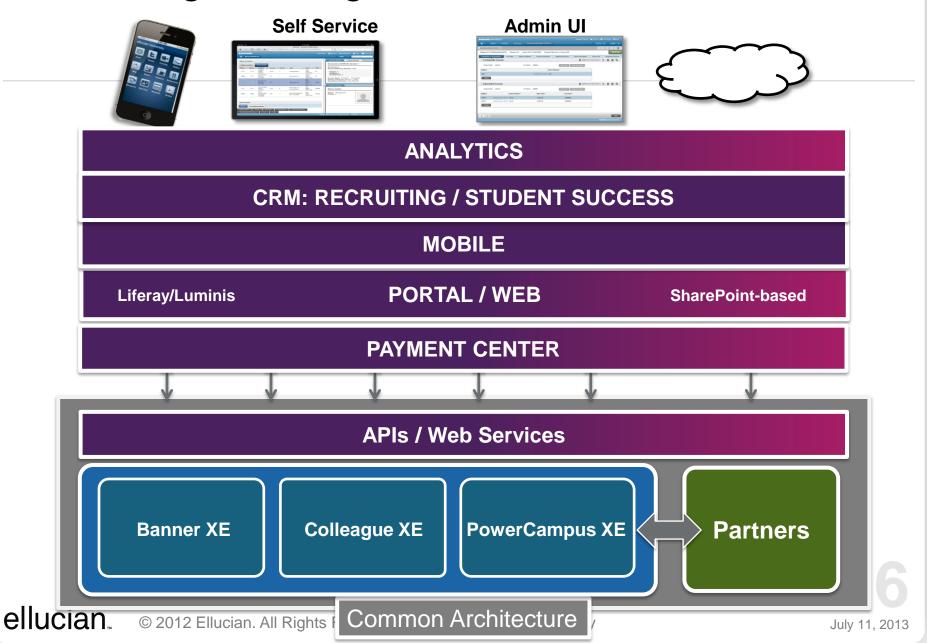


Ellucian XE

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

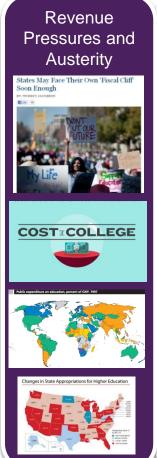
Extending a Strong Administrative Foundation



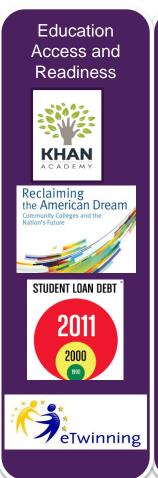


Banner XE

Trends Shaping Higher, Further and Vocational Education

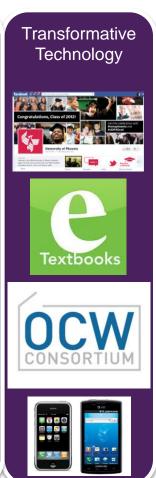












Resulting Higher Education Challenges

Funding Pressures

- · Revenue management: recruitment, retention, fundraising
- · Increasing enrollment, capacity, revenue generation
- · Tuition pressures and affordability

Operational Efficiency

- · Optimizing resources, containing costs
- · Process transparency, agility, improvement
- · Financial visibility, discipline, controls, metrics

Student Success

- Services and tools to keep learners on track
- · Diverse, flexible pathways to learning
- Improving learning outcomes (retention, completion, etc.)

Accountability

- · Timely, reliable, useful information for each stakeholder
- Measuring and documenting performance, outcomes, compliance
- · Data-driven decisions and discovery-based planning

Constituents' Expectations

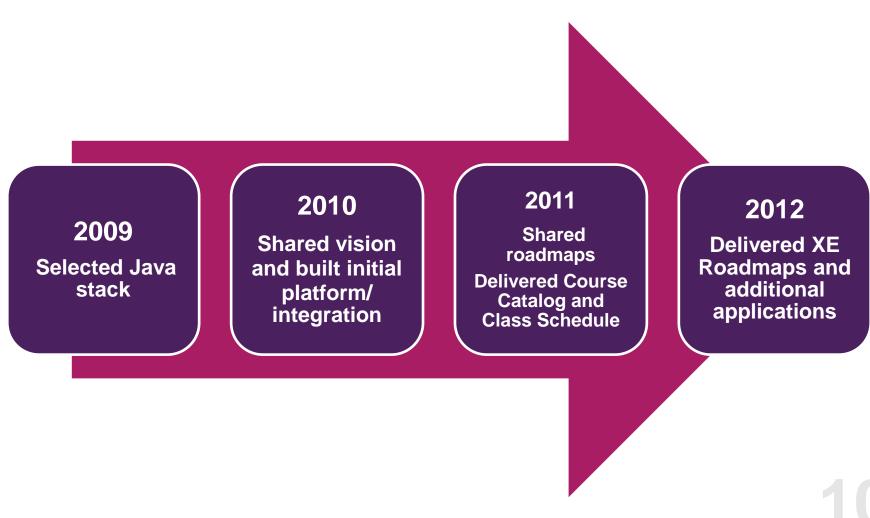
- Faster, more flexible access to information and services
- · Managing and keeping up with pace of technology change
- · Education experiences that set your institution apart

Engaging the Community

- Cultivating relationships with constituents of all types
- Partnerships with donors, peer institutions, industry, etc.
- Shared services, community source, resources, information, best practices

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From Horizon to Banner XE



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July 11, 2013

Higher Education Challenges and Customer Strategic Priorities

Funding Pressures

Operational Efficiency

Student Success

Accountability

Constituents' Expectations

Engaging the Community

Usability

Features / Functionality

Single Global Product

Configuration

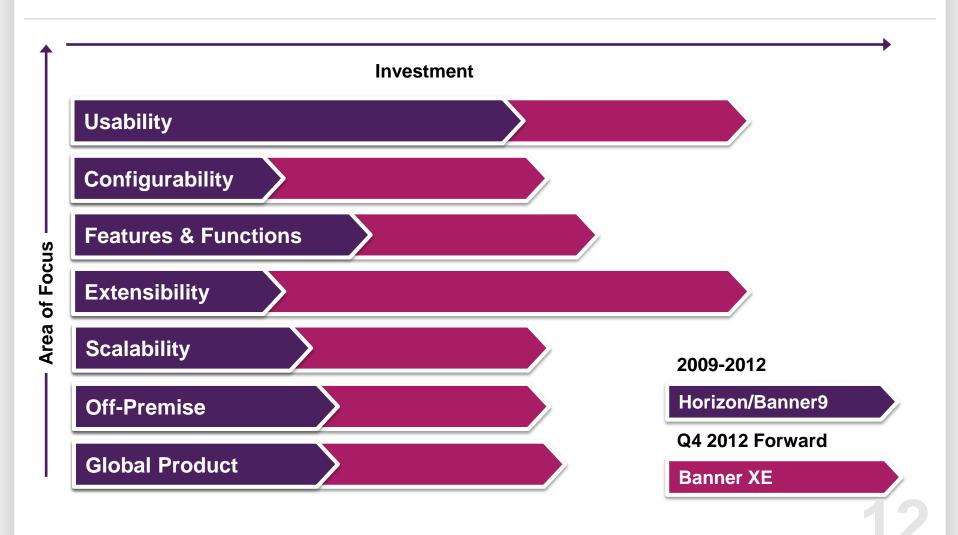
Extensibility

Scalability

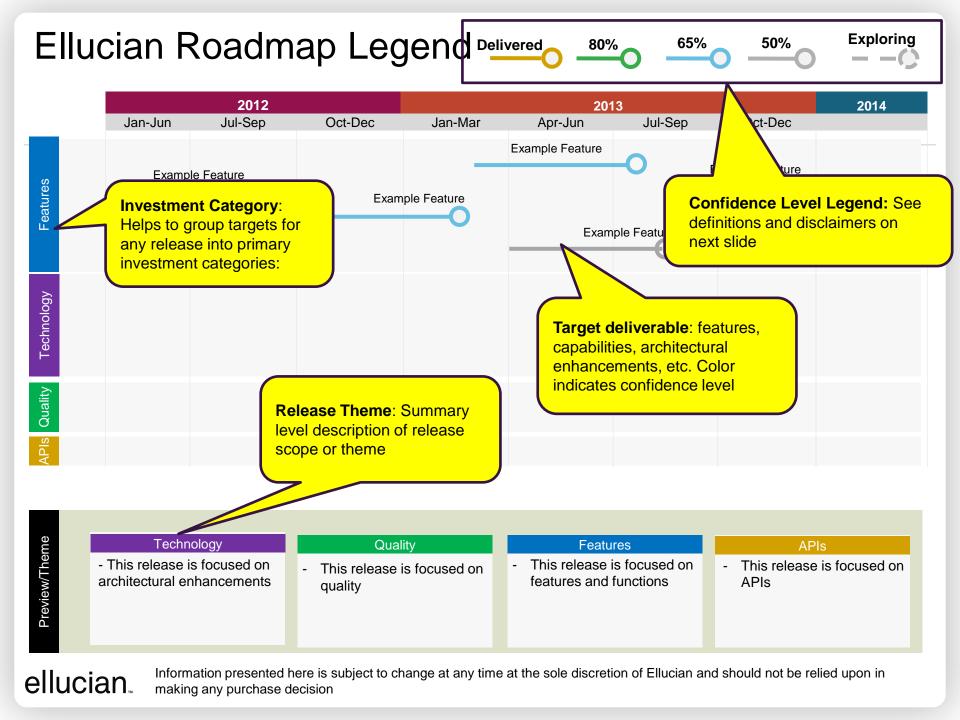
Cloud Delivery



Investments in Banner XE Doubling as Result





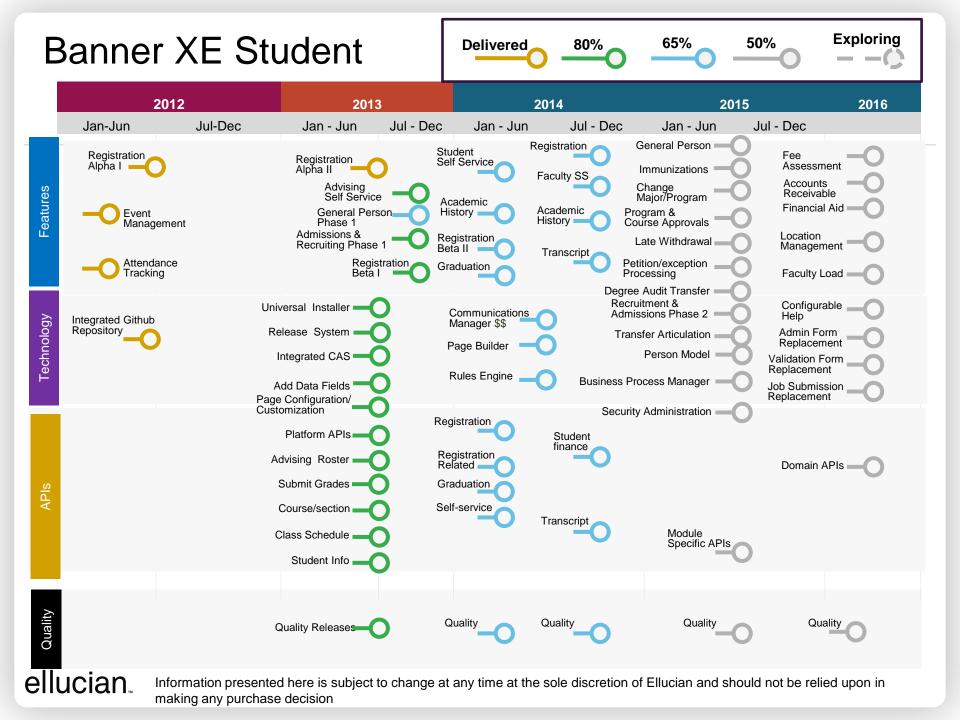


Confidence Level Definitions

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.



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 Architecture

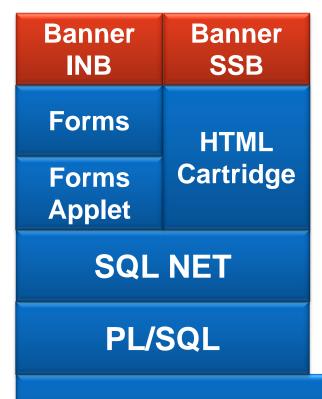
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The Database stays the Same

Benefit = Stability

Benefit = Flexibility

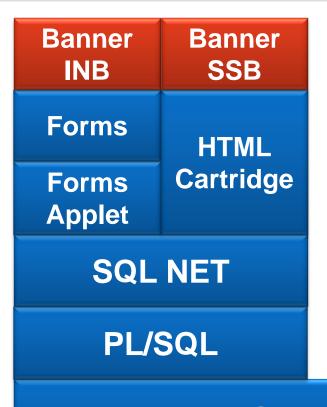
Oracle Database



Legacy Oracle Based Technology Stack

Oracle Database

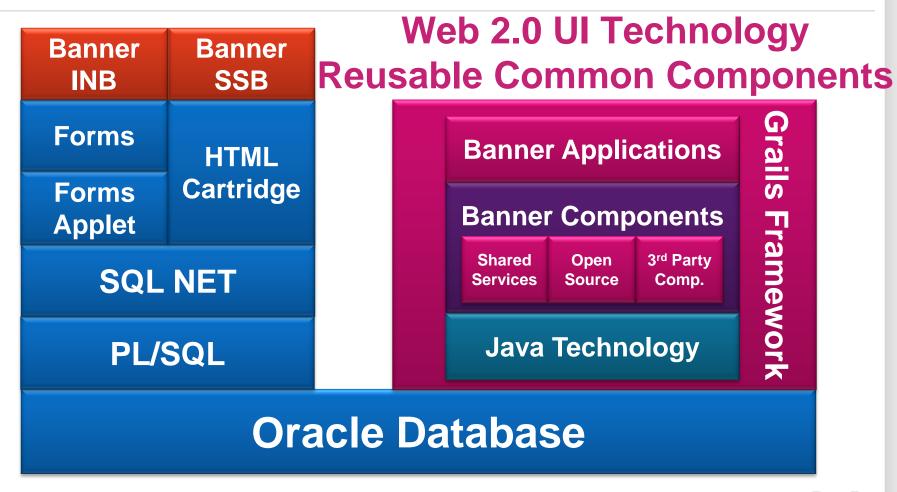
Banner 8 Apps Built on Oracle Stack

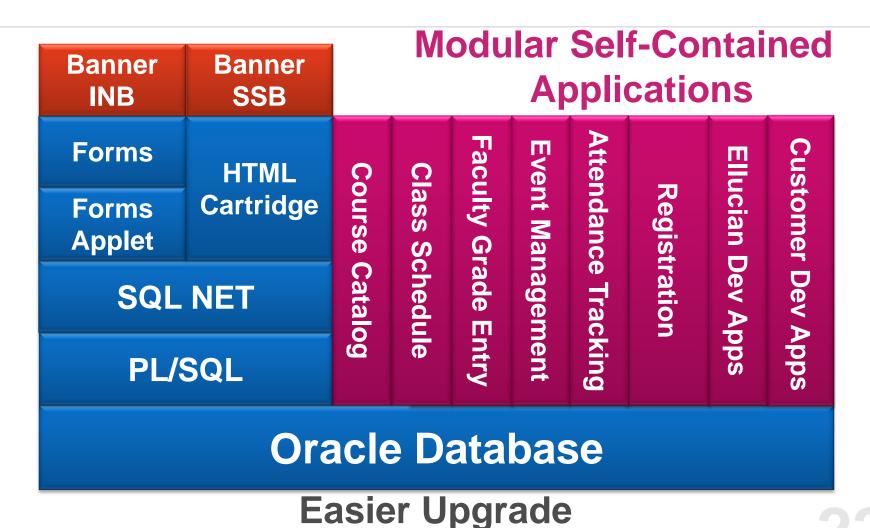


Grails Uses Groovy and Runs on the JVM



Oracle Database





ellucian. Take Advantage of Technology Faster



Banner XE Applications

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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

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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
- Critical to XE success!



Catalog & Schedule Development Partners

The UNIVERSITY of OKLAHOMA













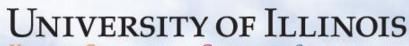
Faculty Grade Entry Development Partners





Georgetown VAYNE STATE





URBANA-CHAMPAIGN · CHICAGO · SPRINGFIELD











The UNIVERSITY of OKLAHOMA



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Attendance Tracking Development Partners

























Event Management Development

Partners

ESSEC
BUSINESS SCHOOL













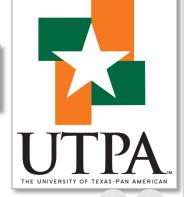






URBANA-CHAMPAIGN · CHICAGO · SPRINGFIELD





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XE Early Adopters

- Liberty University Catalog & Schedule
- Purdue University Main Campus
 - Faculty Grade Entry
- Shippensburg University of PA
 - Catalog and Scehdule
 - Faculty Grade Entry
- University of Oklahoma Norman Campus
 - Faculty Grade Entry



Banner XE Applications in GA – Next Releases

Application	Key Deliverables	Target Timeline
Course Catalog 9.1.0.1	Patch Release to fix key issues raised by Early Adopters	July 2013
Class Schedule 9.1.0.1	 Patch Release to fix key issues raised by Early Adopters 	July 2013
Attendance Tracking 9.0.0.2	Patch Release to fix key issues raised by Early Adopters	July 2013
Event Management 9.2	 Support for CAS in Event Admin Performance Improvements for multiple functions 	August 2013
FGE 9.2	 Focus on Grade Import/Export Performance Improvements and Defect Resolutions 	August 2013
Catalog and Schedule 9.2	 Code in Git Repository Performance and Memory Usage Improvements 	Sep 2013
Attendance Tracking 9.1	Migrate to latest Platform and address key open issues	Q4 2013



XE Projects in Development

XE Projects in Development

- XE Registration
 - CR 1 Q4 2013
 - GA Q4 2014
- XE Admissions & Recruiting Q4 2013
- XE Advising Q4 2013
- XE Academic History Q4 2014
- Banner Communications Management Q2 2014



XE Registration

Banner XE Registration Objectives

New Registration and Advising Experience

- Enhanced user experience
 - Students, Advisors and Administrators

Options for Multiple Registration Models

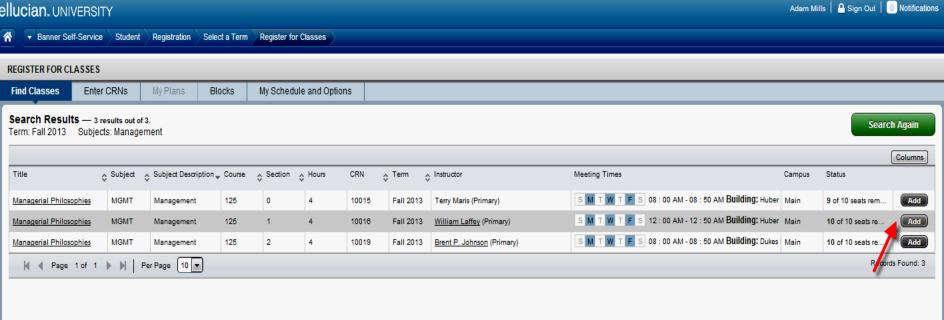
Supports Search & Select, Block and Structured Registration

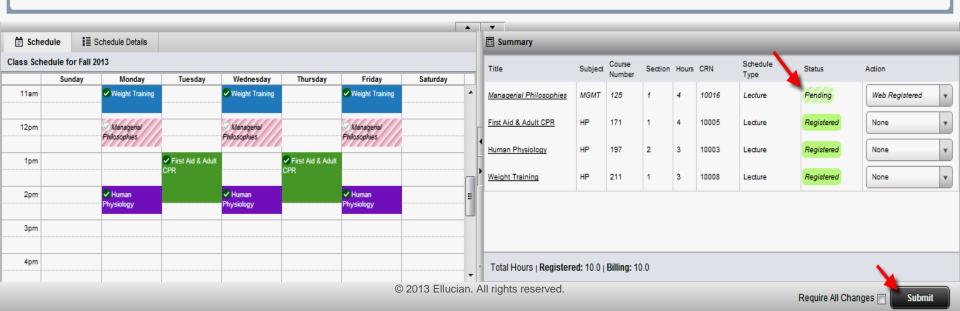
Incorporates Degree Planning Information

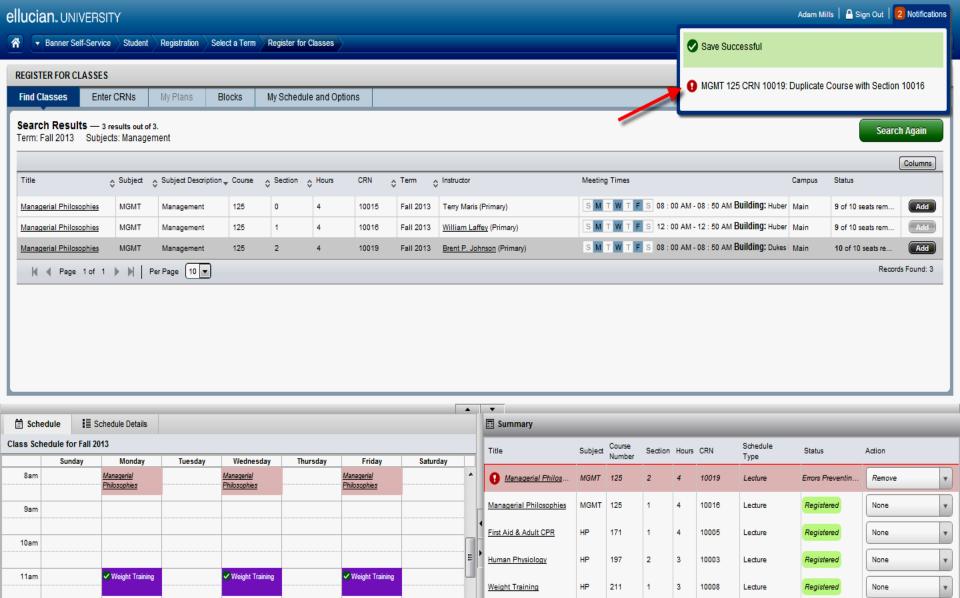
- Option to include CAPP or DegreeWorks data
 - As part of the registration planning process

Advising and Registration Models

- New registration summary and calendar metaphor
- New Registration & Degree plan function
 - DegreeWorks Student Education Plans (SEP)
 - Registration create term registration plans
 - Course or section
 - Create registration plan from DW SEP
 - Projected or suggested courses
 - Must write output to Ellucian web service and APIs
 - CAPP and Other degree audit systems
- Enhanced Block Registration
 - Structured blocks of classes defined by each customer
- Structured or Programme Based
 - UK, Ireland and Australian model
 - Compulsory modules are prescribed
 - Optional and Elective module choice







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Total Hours | Registered: 14 | Billing: 14

ManagerialPhilosophies

First Aid & Adult

✓ Managerial Philosophies

First Aid & Adult

Managerial

12pm

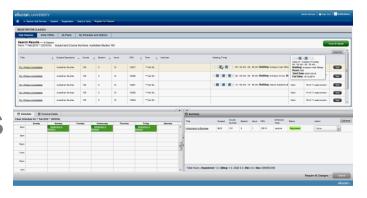
1pm

Submit

Require All Changes |

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



XE Registration Timeline

Project Kickoff

• Nov. 3, 2011

Alpha II release

• Mar. 11, 2013

Controlled release II

• Q2 2014













Alpha I release

• Oct. 25, 2012

Controlled release I

• Q4 2013

General release

• Q4 2014

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 Development Partners



























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Questions & Answers



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Other XE Projects in Development

Admissions & Recruiting - Multiple Phases

Phase I – Q4 2013

Phase II - Q2 2014

Expanded data

Forms Conversion General Person, Recruiting, Admissions Enhanced rules processing in ratings, decisions and confirmations

Single customizable tool for data exchange

Enhance the User Experience through the new XE look and improved process flow

Enhanced Checklist rules and functionality

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Admissions/Recruiting Development Partners























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Advisor Self Service

Purpose:

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

Status:

- Kicked off in April 2013
- Development Partner Group formed.

Deliverables

- Advising Roster, with key student data available at first glance
- Student profile with 2 dozen default data elements
- Step one in rationalizing the notes/comments/interactions functionality

Time Frame

- Alpha Sept. 2013
- Controlled Release Oct. 2013
- GA November 30, 2013

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Advisor Self Service Development Partners















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Academic History – Phase 1 – Started in May

Academic History 9.0 - Beta (Controlled Release) - Jun 2014

- Forms conversion for the administrative processes and any related Self Service functionality for 'End of Term' processing
 - Grades and Grading
 - Roll to Academic History and Grade Maintenance
 - Repeat Processing
 - GPA Calculation
 - Academic Progress
 - Transcript requests

&

Academic Standing

Global

Enhanced Electronic Grade Book - ESC

50 ulv 11, 2013

Academic History – Phase 2

Academic History 9.0 – GA (scheduled for Dec 2014)

- Forms conversion for the administrative processes and any related Self Service functionality for 'End of Term' processing
 - Graduation Processing
 - Graduation Ceremonies
 - Awarding Degree



Banner Communication Management

Purpose

 Enable tactical and operational communications associated with administration functions

Status:

- Kicking off in August 2013
- Development Partner selection in July 2013

Preliminary Scope

- Multi Channel Communication with Students
- Ability to communicate with other constituents (Faculty, Parents, Administrators)
- Communication Capability in XE Technology

Technical Approach

- UI and Usability Improvements consistent with Banner XE
- Security/IDM/I18N infrastructure that is consistent with Banner XE
- Common table naming conventions and other protocols consistent with Banner Student XE
- MEP support



APIs

- APIs are delivered as RESTful Web Service
- Process will start by exposing the APIs for delivered XE applications
- Provide institutional developers with developers guide and standards to develop and support APIs

	USABILITY	FEATURES/ FUNCTION	SINGLE GLOBAL PRODUCT	CONFIGURABILITY & EXTENSIBILITY	SCALABILITY	CLOUD DELIVERY
Person Identification			×	×		×
Advising Roster			×	×		×
Submit Grades			×	×		×
Student Info - Academic			×	×		×
Student Info - Registration			×	×		×
Course Catalog			×	×		×
Class Schedule			×	×		×

Banner XE Configurability & Extensibility

Customization

- Application Skinning
- Changing Text & Labels
- Data Masking & Supplemental Data Engine

Extension

- Adding or Removing a Field (UI and Model)
- Augmenting Business Logic
- Changing Business Rules

Modification

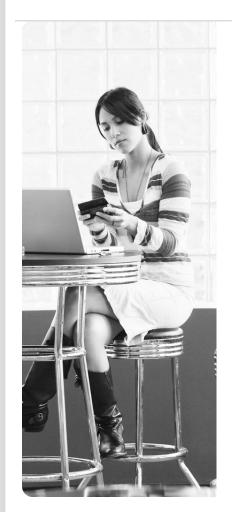
- Accessing Git repositories
- Using modern development practices
- Using Banner XE Platform

Integration

- Framework plugins
- SSO
- Menu Integration



Banner by Ellucian Alive and Well

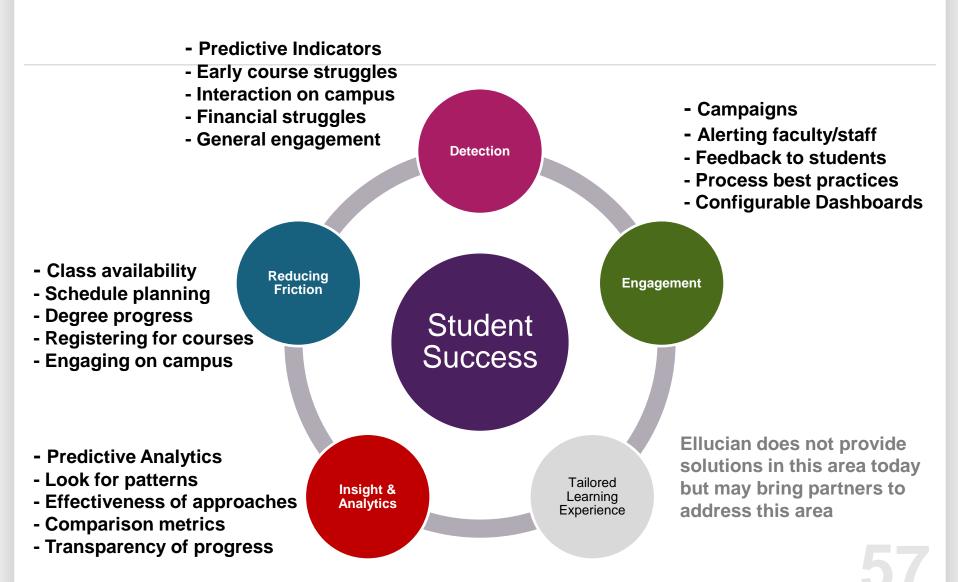


"Making sure Banner 8 is supported for a long time because most clients don't have the budget or human resources to upgrade to 9 especially since the upgrade involves fundamental changes in technology."



Student Success

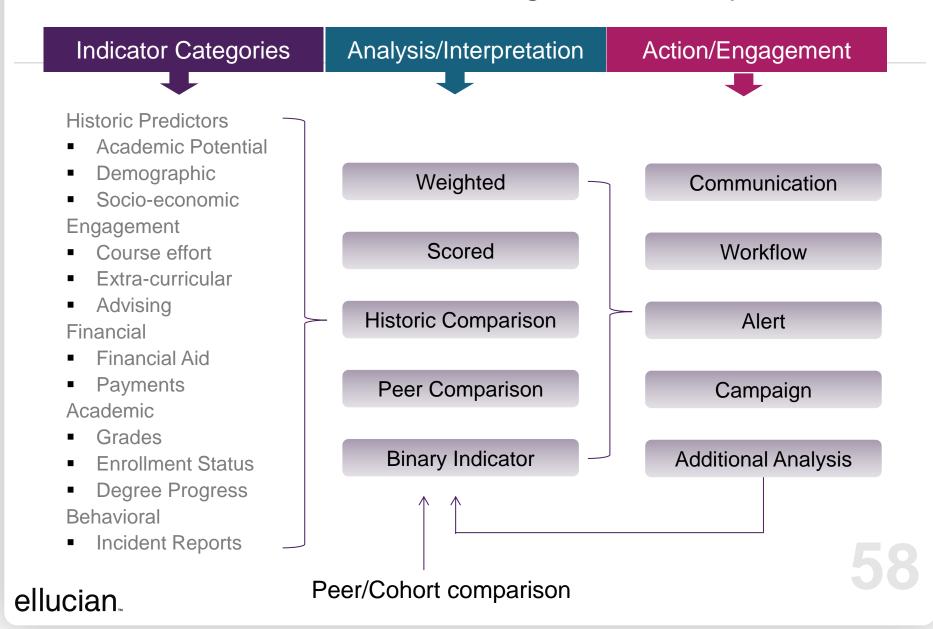
Ellucian Student Success Framework



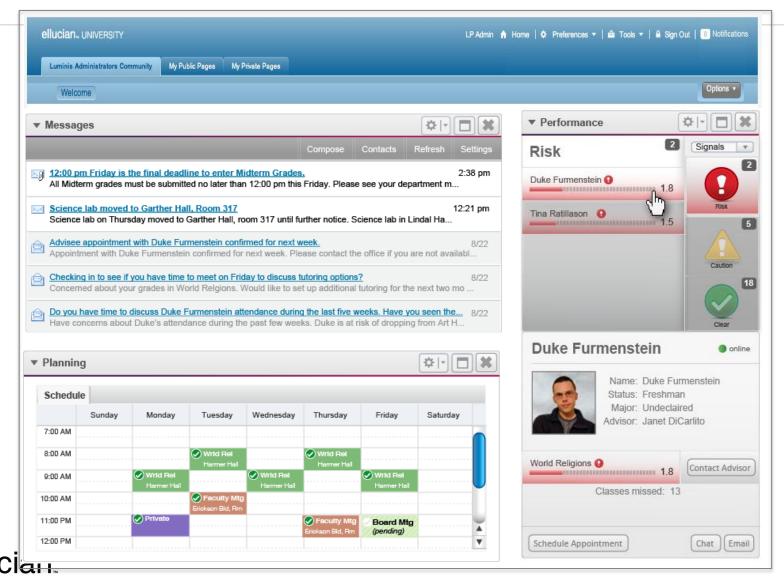
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Student Success Core Design Summary



Student Success Dashboards



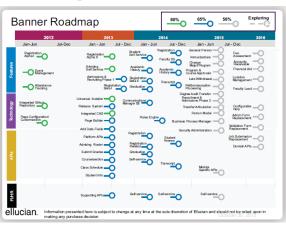
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Summary

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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Q & A ed.hauser@ellucian.com



Education Services

Ellucian On-Demand Subscription Library

Technical Training Week

Jamie Chambron
Vice President * Management Consulting & Education Services

The Importance of Continuing ERP Education

"ERP systems constantly change due to upgrades, additional features, or addition of new functionalities. In addition, knowledge leakage due to employee attrition can be as high as 25% in any given year. Consequently, ERP training is an ongoing business requirement and not a one-time event. Best practices suggest providing recurring refresher training to all system users. Also, to ensure ongoing knowledge retention, many of our clients make the successful completion of appropriate training courses part of the employees' annual performance evaluation."

Learning Solutions Magazine
5 Tips for a Successful ERP Training Program

5July 11, 2013

Training is Becoming Difficult!

- We can't travel to attend training classes.
- We can't afford to be tied up in training classes for long periods of time.
- We need on-demand, just in time knowledge to increase efficiency and productivity.
- We need a quicker way to bring new employees up to speed.
- We need to equip our experienced users with tools for augmenting their expertise.

The Ellucian On-Demand Subscription Library 24x7 eLearning on Ellucian Solutions

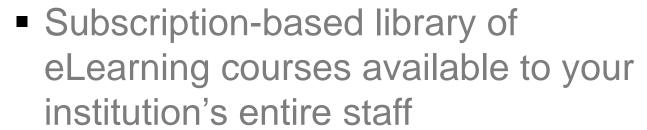
Features

- Access Anytime and Anywhere
- Updated Continually
- Employee View
 - Be More Efficient by Staying Continuously Trained on Solution Functionality
 - Reduce Time Away from Day Job by Consuming Short Snippets of Education (20 minutes average) versus Days of Training
 - Access Training Just in Time to Do Something Different
- Manager/Institution View
 - Bring New Employees Up to Speed Quickly on Ellucian Systems
 - Track Employee Progress and Completion of Training
 - Enable Schools to Stay Current on Ellucian Solutions and Avoid the "Value Gap"
 - Provide Cost Effective End User Training
- Free up time for IT to focus on technology management not end user training

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Ellucian On-Demand Subscription Library





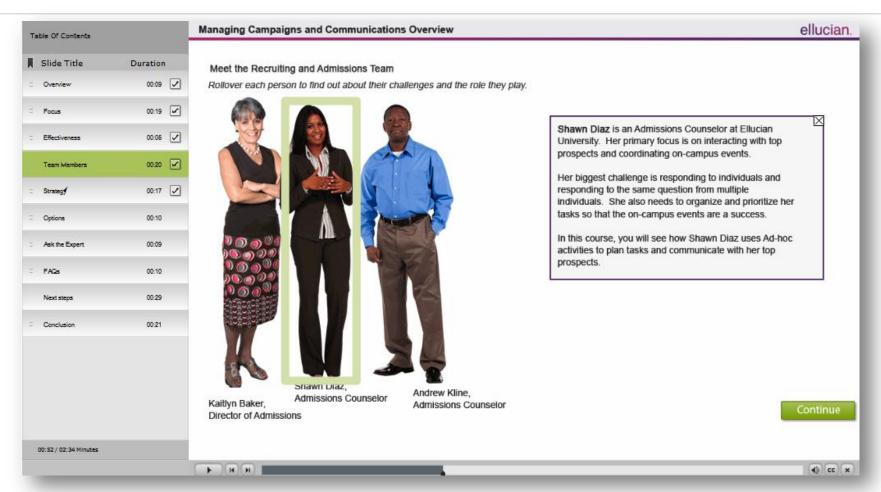


 Primarily video-based training averaging 20 minutes per course

 Over 4,000 courses across 5 course collections... and growing monthly

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Ellucian On-Demand Subscription Library



Recorded Demo @ http://www.ellucian.com/educationservices/
For live demo or trial account contact edservices@ellucian.com/educationservices/
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Technical Training Week Sept. 30 – Oct. 3, Reston VA

	Banner System Admin I	Banner System Admin	Banner XE Programming and Development	Luminis Portal	Identity Management Using BEIS	Technology Management and Strategy					
	REGISTRATION OPEN										
	Monday	Monday	Monday	Monday	Monday	Monday					
8:30 AM	Opening session and morning	Opening session and	Opening session and morning	Opening session and	Opening session and	Opening session and morning					
10.00 414	break	morning break	break	morning break (15 mins)	morning break (15 mins)	break (15 mins)					
10:00 AM	Installing and Configuring the Web Logic Server	Preparing for a Banner XE Install	Modifying Banner XE Code	Luminis Roadmap and Luminis 5.1 Overview	An Overview of Banner Identity Management	Improving Operational Efficiency Through Business					
	<u>web Logic Server</u>	Ilistali		Luminis 5.1 Overview	identity Management	Process Revitalization					
1:30 PM	Installing and Configuring the	Preparing for a Banner XE	_Modifying Banner XE Code	Enabling Single Sign-On for	An Overview of Outbound	Improving Operational					
	Web Logic Server (cont.)	Install (cont.)	(cont.)	Lumnis	and Inbound Provisioning	Efficiency (cont.)					
		, ,	, ,			, , ,					
	Tuesday	Tuesday	Tuesday	Tuesday	Tuesday	Tuesday					
8:30 AM	Installing and Configuring the	Installing and Configuring	Modifying Banner XE Code	Integrating Banner Data	Installing and Configuring	Transforming Higher Education					
	Web Logic Server (cont.)	the Web Logic Server		with Luminis	BEIS for Outbound	through Technology					
10:15AM	Get Ready for Groovy Grails	cont.	cont.	cont.	Provisioning cont.	Roundtable Discussion					
1:30 PM	Installing, Configuring, and	Installing and Configuring	Modifying Banner XE Code	Moving from Luminis 4.0 to	Installing and Configuring	IT Governance: Roundtable					
1.301101	Administering the Git Repository	the Web Logic Server	(cont.)	5.04	BEIS for Inbound	Discussion					
	Server	(cont.)	<u>(contry</u>	<u> </u>	Provisioning						
	Wednesday	Wednesday	Wednesday	Wednesday	Wednesday	Wednesday					
8:30 AM	Installing, Configuring, and	Installing and Deploying a	Modifying Banner XE Code	<u>Developing Portlets</u>	An Overview of Single Sign-	Using Analytics and Scorecards					
	Administering the Ellucian	Banner XE Application	(cont.)		On for INB and SSB	to Support Institutional					
10.15 484	Solution Manager		Cont	Cont.	Installing and Configuring	Outcomes					
10:15 AM	cont.	cont.	Cont.	Cont.	Single Sign-On for INB and	Cont.					
					SSB						
1:30 PM	Installing, Configuring, and	Installing and Deploying a	Modifying Banner XE Code	Developing Portlets (cont.)	Installing and Configuring	Using the Cloud, MEP, and					
	Administering the Ellucian	Banner XE Application	(cont.)	<u> </u>	Single Sign-On for INB and	Shared Services to Resolve					
	Solution Manager (cont.)	(cont.)			SSB (cont.)	Institutional Challenges					
	Thursday	Thursday	Thursday	Thursday	Thursday	Thursday					
8:30 AM	Tuning Your Banner Environment	Enabling Single Sign-On	Modifying Banner XE Code	Developing a Portlet (cont.)	Installing and Configuring	Developing the IT					
		with Banner 8x and Banner	(cont.)		Single Sign-On for INB and	Organization: Identifying Skill					
		<u>XE</u>			SSB (cont.)	and Knowledge Gaps within Your IT Organization					
11:00 AM				Luminis Performance		Your II Organization					
11.00 AIVI				Testing							
12:00 PM	TTW Ends	TTW Ends	TTW Ends	TTW Ends	TTW Ends	TTW Ends					
ellucia	ellucian July 11, 2013										
	AI ITM					July 11, 2013					

Thank You!

<u>Jaime.Chambron@ellucian.com</u> <u>http://www.ellucian.com/educationservices/</u>

Email <u>edservices@ellucian.com</u> for Demo Account or More Information