Ellucian XE
Banner by Ellucian Roadmap

Georgia Summit
Ed Hauser,
Director for Student & Enrollment Services

September 17, 2014
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Agenda

1. Ellucian XE: Setting the Stage
2. New Banner function
3. Acceleration of Banner
4. Extensibility
5. APIs
6. Q & A
Ellucian Extensible Ecosystem (XE)

An innovative strategy grounded in common principles, standards, and services that help you leverage economies of scale across our portfolio.
The Ellucian XE Vision
Extending a Strong Administrative Foundation

- Self Service
- Admin UI

Analytic

- CRM: Recruiting / Student Success
- Mobile
- Portal / Web
- Payment Center

APIs / Web Services

Banner

Partners

Common Architecture
The XE Strategy and Design Principles

| Mobile          | Self Service   | Admin UI      | Cloud         |

XE Design Principles

- Usability
- Features/Function
- Cloud Readiness/Scalability
- Configuration over Customization
- Extensibility
- APIs/Integration
- Single Global Product
Path to Adopting XE Applications

Common Steps

**All Clients**
- Install and configure ESM
- Run DBEU
- Hardware planning & set up
- Plan/implement SSO Strategy
- Deploy Banner application powered by XE
- Review and document mods

**Leverage Extensibility**

**Many Clients**
- Deprecate and use baseline functionality
- Leverage extensibility

**Program Mods in XE**

**Fewer Clients**
- Rewrite using XE technology
- Set up and configure GIT

Least Effort/Complexity  Greatest Effort/Complexity
Applications Leveraging XE Strategy

Available Applications

- Banner
  - Catalog
  - Schedule
  - Faculty Grade Entry
  - Attendance Tracking
  - Event Management
  - Advising student profile
- Ellucian eTranscripts
- Ellucian Mobile
- Ellucian Portal

Applications in Development

- Banner
  - Registration, controlled release
    - GA Q4 2014
  - Academic history, electronic gradebook
    - Q4 2014
  - Student Profile
    - Q4 2014
  - Communication Management
    - CR I/9.0 Q4 2014
  - Employee Profile – Q4 2014
- Ellucian Elevate
  - Banner integration Q4 2014
- Ellucian Student Success
  - Q4 2014
Registration
Register For Classes
Registration
My Schedule and Options

Register for Classes

Find Classes  |  Enter CRNs  |  My Plans  |  My Schedule and Options

Summary

Term: Fall 2014

<table>
<thead>
<tr>
<th>Title</th>
<th>CRN</th>
<th>Schedule Type</th>
<th>Grade Mode</th>
<th>Level</th>
<th>Study Path</th>
<th>Date</th>
<th>Status</th>
<th>Message</th>
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<tbody>
<tr>
<td>Foundations of Math</td>
<td>11914</td>
<td>Lecture</td>
<td>Standard Letter</td>
<td>Undergraduate</td>
<td>None</td>
<td>03/24/2014</td>
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<td>Web Registered...</td>
</tr>
</tbody>
</table>

Class Schedule for Fall 2014

Submit
Registration

Improved Academic Advising
• Students and advisors can create planned registration schedules from the DegreeWorks SEP degree plan which provides improved advising and faster and more error free registration.

Faster Enrollment
• The new UI for registration includes a calendar metaphor that allows students to quickly build their schedule and register

Improved Course Demand Analysis
• Planned registration schedules allow institutions to access the data from the plans to determine course demand for any given term

“We went live before our 2014 spring break for Fall 2014, and basically sent an email to 24,000 student the Friday before we went live telling the students there was a new UI…this was an implementation that was just a dream—we have yet to have a single negative comment on our registration listserv or any calls to our office with issues…the students thought it was very intuitive and easy to use and used both the registration planning and registration function.”

—University of Oklahoma
<table>
<thead>
<tr>
<th>Name and ID</th>
<th>Program</th>
<th>Primary Major</th>
<th>Student Status</th>
<th>Student Type</th>
<th>Primary Advisor</th>
<th>Advisor Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acadia, Tom</td>
<td>Bachelor of Arts (B.A.)</td>
<td>Business Technology</td>
<td>Active</td>
<td>Continuing</td>
<td></td>
<td>Academic Counselo</td>
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<tr>
<td>Adeenj, Robert</td>
<td>Bachelor of Science (B.S.)</td>
<td>Sport Management</td>
<td>Active</td>
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<td></td>
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<td>Academic Counselo</td>
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<tr>
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<td>Active</td>
<td>New First Time</td>
<td></td>
<td>Academic Counselo</td>
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<tr>
<td>Anaheim, Geone</td>
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<tr>
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<td>Sport Management</td>
<td>Active</td>
<td>New First Time</td>
<td></td>
<td>Academic Counselo</td>
</tr>
</tbody>
</table>
Advising Student Profile

The Advising Student Profile provides a convenient single view of the most critical information necessary for students and advisors to make better academic decisions

- Consistent presentation of data
- Displayed in an easy to read format
- Fast and efficient access to pertinent student records
- Reduces training required for advising processes within the institution
Academic History
<table>
<thead>
<tr>
<th>Student ID</th>
<th>Student Name</th>
<th>Registration Status</th>
<th>Final Percentage</th>
<th>Final Grade</th>
<th>Final Reason</th>
<th>Final Activity Date</th>
<th>Comment</th>
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</thead>
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<tr>
<td>HOSHO0047</td>
<td>Anderson, Paul C.</td>
<td><strong>Registered</strong></td>
<td>N.A.</td>
<td>38.25</td>
<td>Zero calculated Mark/Grade</td>
<td>09/09/2014</td>
<td>Student Withdrawal</td>
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<tr>
<td>HOSHO0035</td>
<td>Ghatro, Amy A.</td>
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<td>N.A.</td>
<td>43.36</td>
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<td>Ospel, Ray S.</td>
<td><strong>Registered</strong></td>
<td>N.A.</td>
<td>57.41</td>
<td>Incomplete Grade given (excused for personal reasons)</td>
<td>09/09/2014</td>
<td></td>
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<tr>
<td>HOSHO0031</td>
<td>Patel, Barun K.</td>
<td><strong>Registered</strong></td>
<td>N.A.</td>
<td>57.73</td>
<td></td>
<td>09/09/2014</td>
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<tr>
<td>HOSHO0030</td>
<td>Peddinti, Charan S.</td>
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## Components

<table>
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<tr>
<th>Name</th>
<th>Description</th>
<th>Weight</th>
<th>Grade Scale</th>
<th>Must Pass</th>
<th>Included In</th>
<th>Grades Remaining</th>
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<tr>
<td>TREST</td>
<td>test</td>
<td>234</td>
<td>KP SCALE</td>
<td>NO</td>
<td>Final</td>
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<td>KP SCALE</td>
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<td>Final</td>
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<tr>
<td>MUSIC</td>
<td>Music Test</td>
<td>34</td>
<td>KP SCALE</td>
<td>NO</td>
<td>Final</td>
<td>2</td>
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<tr>
<td>LAB</td>
<td>Lab Test</td>
<td>45</td>
<td>KP SCALE</td>
<td>NO</td>
<td>Midterm</td>
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## Enter Component Grades

<table>
<thead>
<tr>
<th>Name</th>
<th>Id</th>
<th>Score</th>
<th>Out of</th>
<th>Percent</th>
<th>Grade</th>
<th>Rolled</th>
<th>Submission Date</th>
<th>Extension Date</th>
<th>Grade Change Reason</th>
<th>Comment</th>
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</thead>
<tbody>
<tr>
<td>Tadavar, Rupi T.</td>
<td>HCH00048</td>
<td></td>
<td>100</td>
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<td></td>
<td>09/08/2014</td>
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<tr>
<td>Gopal, Ray S.</td>
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<td>OE - Original Entry</td>
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<tr>
<td>Jhonsen, Michale A.</td>
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<td>Kasprzak, Gary A.</td>
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<td>100</td>
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<td>F</td>
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<tr>
<td>Maxwell, Glen K.</td>
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<td></td>
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</tr>
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</table>

## Course Details

- **Title**: History of System Test Physics S
- **Subject**: History System Test Subject
- **Course**: HPHYS
- **Term**: 2014440-Krishna Term (2014440)
- **CRN**: 35001
- **Course Dates**: 01/01/2014 - 12/31/2014
- **Primary Instructor**: Krishna C. Faculty
- **Secondary Instructor(s)**: Krishna P. Faculty
- **Midterm Cutoff**: 09/17/2014
- **Assessment Dates**: 09/01/2014 - 09/22/2014
- **Reassessment Dates**: 09/03/2014 - 09/22/2014

**HPHYS, Section 01**

- **Course Reference Number**: 35001
- **Grades Remaining**: 4
- **Eligible for Assessment (Component)**: 4

**Student Details**

- **Registration Status**: "Registered"
- **Credits**: 4
- **Current Grade Change Reason**: OE
Improved and modern user experience from grading to graduation processing and transcripts

Support for Global models of maintaining and tracking Academic History

- Electronic gradebook, graduation processing and other functionality will be enhanced to support a global set of institutional practices.

Streamline processes for both administrative personnel and students

- The streamlined processes will complement the modern user experience of the other modules such as Registration and Advising Student profile
Communication Management
What is Banner Communication Management

New baseline capabilities and functions to enable tactical and transaction related communications associated with administrative functions in Banner

New tools for all customers to create, publish, and track constituent communications for any person known to Banner

APIs to help integrate with other systems & processes

• Third party database query tools, e.g. Cognos, Evisions
• Recruiter and Student Success interactions via APIs

Leverages some capabilities from Banner 8 POPSEL and BRM expressions
## Communication Management Architecture

<table>
<thead>
<tr>
<th>Banner 8 INB</th>
<th>Banner 8 SSB</th>
<th>XE Architected Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR</td>
<td>Self Service Apps</td>
<td>eTranscripts</td>
</tr>
<tr>
<td>Finance</td>
<td></td>
<td>Advising Student</td>
</tr>
<tr>
<td>Advancement</td>
<td></td>
<td>Faculty Grade Entry</td>
</tr>
<tr>
<td>Student / Fin Aid / A/R</td>
<td></td>
<td>Event Management</td>
</tr>
<tr>
<td>General</td>
<td></td>
<td>Attendance Tracking</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Registration</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Ellucian Dev Apps</td>
</tr>
</tbody>
</table>

### Oracle Database

Banner Communication Management

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Banner Student 8.x
Planned Releases

Student 8.6.7
• September 2014

Elevate
• November 2014

Student 8.7
• November 2014
Banner Student 8.x Releases

- **Patch for 150% - Student 8.6.6.2 (Target: 23/Sep)**
  - SFRNSLC – Extracts student enrollment information for reporting to the National Student Clearinghouse
  - SFRSSCR – Reads and processes NSLDS Student Status Confirmation Report (SSCR) Roster and Error Notification files

- **Patch for Elevate Support – (Beta Rel 18/Sep; GA 14/Nov) OPTIONAL**
  - The audit trail for these objects will still say 8.6.6.2 for now (for Beta) and once the release number is determined appropriately update before GA

- **Student 8.6.7 (GA 29/Sep) OPTIONAL**
  - Changes to DB for Academic History CR and FGE 9.3

- **Student 8.7 (GA 19/Nov)**
  - Rollup of releases from 8.6.5.x up to the patch for 150% called 8.6.6.2
  - Rollup Release 8.6.7 and
  - Registration GA objects
150% Enrollment Reporting Releases

- **Banner Student 8.6.3 – March 2014**
  - Added SFACPLR to track Program Duration Rules

- **Banner Student 8.6.4 – June 2014**
  - Added CIP Publication Year to STVCIPC
  - Added ¾ time status code of Q to STVTMST

- **Banner Student 8.6.6 – August 2014**
  - Updated SFRNSLC and SFRSSCR Enrollment Reports

- **Banner Student 8.6.6.1 – September 8, 2014**
  - Defect Resolutions for SFRNSLC and SFRSSCR Enrollment Reports

- **Banner Student 8.6.6.2 – Target is September 23, 2014**
  - Defect Resolutions for SFRNSLC and SFRSSCR Enrollment Reports
Financial Aid
Financial Aid Releases

• **8.21 – 2014-2015 Summer Release**
  • Delivered August 27, 2014 – Scheduled Academic Year (SAY) setup (required release)

• **8.21.1 – 2015-2016 Early Decision Release**
  • CSS PROFILE and INAS – anticipated for October 30, 2014 (optional release)

• **8.22 – 2015-2016 Winter Release**
  • EDE Dataload, Correction Processing and ISIR Print – anticipated for January 15, 2015 (required release)

• **8.22.1 – BBAY/Loan Streamlining and Redesign**
  • Anticipated for end of February 2015 (optional release). We will be doing Alpha testing November, 2014 – January 9, 2015
BBAY to date:

- Holds by term – 8.3.1
- Archive/Purge – 8.4.1 (optional)
- Requirements by term – 8.5
- Enrollment Periods – 8.9
- Period Based & Algorithmic Budgeting – 8.14.1
- Period Based Awarding – 8.18.1
- Scheduled Academic Year (SAY) Setup – 8.21
Degree Works
Degree Works Releases

- 4.1.1 - 2012 OCT - Released
- 4.1.3 - 2013 AUG – Released
  - Minimum for Banner Registration integration
- 4.1.3.1 2014 FEB – Released
- 4.1.4 2014 AUG – Released
- 4.1.x 2015 Q2 - ROADMAP
- 4.1.x 2016 H1 - ROADMAP
Accelerating Banner
Discovering patterns and perfecting our design/build approach

Needed to learn how to ramp/train large number of developers

Needed to abstract the new design patterns into core platform for speed

Needed customer feedback on UI design and extensibility approach

Began exploring technical acceleration approaches—specifically code conversion techniques
Modernizing Banner

Administrative Imperatives

- Technology—Remediate Oracle Forms
- Usability—Consumer web in high productivity mode
- Configuration and Extension, not modification
Modernizing Banner

Administrative Imperatives

- Technology—Remediate Oracle Forms
- Usability—Consumer web in high productivity mode
- Configuration and Extension, not modification

Self-service Imperatives

- Usability—Consumer web for casual users
- Rich functionality, evolving with Higher Education
- Configuration and Extension, not modification
Modernizing Banner

Administrative Imperatives

• Technology—Remediate Oracle Forms
• Usability—Consumer web in high productivity mode
• Configuration and Extension, not modification

Self-service Imperatives

• Usability—Consumer web for casual users
• Rich functionality, evolving with Higher Education
• Configuration and Extension, not modification

Integration Imperatives

• API-based integrations
• Industrial Strength Superhighways
• Configuration and Extension, not modification
### General Employee Details

**Employee Status:** ACTIVE

- **Employee Group:** 
- **Benefit Category:**

**COA Organization**

- **Home Department:** 
- **Check Distribution:** 
- **District or Division:**

**Service Dates**

- **Current Hire:** 22-AUG-2014
- **Adjusted Service:** 22-AUG-2014
- **First Work Date:** 22-AUG-2014
- **Original Hire:** 22-AUG-2014
- **Seniority:** 22-AUG-2014
- **Last Work Date:**

**Termination**

- **Reason:**
- **Last Work Date:**
- **Termination Date:**
Proposed Roadmap Strategy - CONFIDENTIAL

1st Delivery Q1 2012

Q4 2014

- Employee Profile
- HR Admin
- HR Self Service
- Finance Admin
- Finance SS
- Student (A/R, Fin Aid, Student, etc) Admin
- Registration SS

Student SS, modular delivery
Extensibility
Transitioning to the New Banner 9.x Applications

Common Meninging…Coming Soon!!!

Central Authentication Service (CAS)

BEIS SSO Manager (CAS)

Banner 8.x INB
- Banner General
- Student
- HR
- Finance
- Financial Aid

Banner 8.x SSB
- Student
- Faculty
- Employee
- Financial Aid

Banner 9.x Applications
- Catalog
- Schedule
- Faculty GE
- Attendance Tracking
- Registration
- Student Profile
- Future Student Apps
- Future Financial Aid Apps
- Future HR Apps
- Future Finance Apps

Banner Database

DBEU
Banner XE 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
The Extensibility Continuum

Customize XE Application(s)—Analyst, UXD
- Customize Page Components (for existing database fields)
- Customize Colors and Fonts (CSS files)
- Customize Labels and Text (resource files)

Extend XE Application(s)—Developer
- Extend Domain (tool, documentation)
- Business Logic changes through AOP (documentation)

Modify XE Application(s)—Developer
- In-line code modifications
- Source code required (Git)

Custom Application Development
- Developers Guide—getting started, standards
- Application Development Tools
# 2014—XE APIs

## Term (List, Detail, Search)
### Advising
- Faculty/Advisor Role
- Advisee Listing
- Advisee Search
- Advisor Roster (List, Search)
- Advisee Grades

## Student Profile
- GPA
- Grades
- Holds
- My Finances
- Class Schedule

## Faculty
- List, Detail
- Faculty Schedule

## Reference Table APIs
- Subjects
- Grade Schemes

## Course Catalog
- Catalog Maintenance

## Class Schedule
- Section Maintenance
- Section Scheduling
- Faculty & Room Assignment
- Faculty Workload Analysis

## Person (Maintenance)

## Rooms & Buildings

## Registration
- Terms open for registration
- Student Registration Eligibility
- Student Registration Status
- Register for Class (includes initialize)
- Add class to Registration Summary
- Process Fee Assessment Summary
- Class Search

## Instructional Methods
## Rest of Student Profile
- Students (List, Search, Detail)
- Contact
- Demographic
- General Information
- Curriculum
- Academic
- Advisors
- Prior Education
- Test Scores
- Cohorts, Attributes, Activities, Co-op
- Education and Athletics
- Fees
- Registration History

## Grade
- Submit Grades (Mid-Term, Final)

## Class Schedule
- List and Search
- Section Enrollment

## Person
- List and Search
The Ellucian XE Registry is the authoritative resource for discovering, testing, and interacting with Ellucian XE APIs.
Places to Find More Information

Access Resources on the Commons
• Banner Development Practices for XE
• Banner FAQs for XE
• Innovation webinars

Download documentation from the Support Center

Attend an Ellucian education class

Contact your Client Partner
Summary

XE applications available today

• Catalog
• Schedule
• Faculty Grade Entry
• Attendance Tracking
• Event Management
• Academic advising student profile

XE applications in development

• Registration, controlled release
• Academic history, electronic gradebook
• Communication Management

Get Ready – DBEU – current versions, CAS/SSO
Contact me

Ed Hauser
Director for Student & Enrollment Services,
TEL: +1 484-631-6813
EMAIL: ed.hauser@ellucian.com
Ellucian Solution Manager

• Provision Banner environments
• Download Banner upgrades
• View documentation for downloaded Banner upgrades
• View installed product versions and available upgrade releases in Banner environments
• Install available Banner upgrade releases on both provisioned (OEL5) and existing Banner (Linux/Unix) environments.
• Deploy Banner 8 and 9 online help and Banner 9 applications delivered in Banner upgrade releases to WebLogic servers

“Ellucian Solution Manager (ESM) has helped DeVry automate the upgrade process that has always caused angst. Our DBAs are extremely happy with the product and have mandated that all upgrades be performed using ESM”

— PV Shrikanth
    IT Engineer
    DeVry Group
Innovating with Ellucian
The Banner Administrative Suite

- Mobile
- Self Service
- Admin UI
- Cloud

- Analytics
- CRM: Recruiting/Student Success
- Mobile
- Liferay/Luminis
- Portal/Web
  - SharePoint-based
- Payment Center

Common Architecture

- APIs/Web Services/eg eTranscripts
  - Student/Degree Works
  - Financial Aid
  - Advancement
  - Finance
  - Human Capital Management
- LMS and other third-party systems
What Is Institutional Performance Management?

- 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

“Tennessee was the first state in the union to link state funding with student outcomes. “Ellucian’s IPM solution will allow us to deliver critical management capabilities to all 19 colleges and universities in our system to ensure that every decision about resource allocation is viewed through the lens of its impact on student outcomes. And we can augment the tools easily as new metrics are developed.”

—Thomas Danford, CIO, Tennessee Board of Regents (TBR)
Ellucian Enterprise CRM

Recruiter
- Degree Planning & Audit
  - educational plan
  - degree audit

Pilot
- Student Information System
  - basic student info
  - registration
  - financial info
  - final grades

Advancement
- Learning Management System
  - performance effort

Other Systems
- behavior
- security
- surveys
- housing
How Ellucian Pilot Can Help

Unify intervention strategies across institutional functions
• Remove roadblocks to success
• Increase efficiencies across the institution

Identify early (and predict) at-risk students
• Introduce intervention strategies earlier

Increase visibility into which programs are effective
• Make more informed decisions about program investments

Better align technology to support strategic student success and retention plan goals
Ellucian Mobile

The worlds most widely adopted mobile solution for higher education

- Over 900 Institutions in 20 countries

Cloud configuration tool allows schools to go live with highly customized mobile solution in hours or days, not weeks or months

Native Integration with all Ellucian ERP Systems

Manage all of your campuses, colleges or departments through a single app

A native mobile application for the devices used most on your campus

- iOS, Android and Kindle Fire support 94% of users

Integrated analytics to ensure adoption and measure ROI
Ellucian Payment Center by TouchNet

- Unified Commerce Platform
- Better Student Services
- Easier PCI Compliance
- Reduced Cost of Payment Processing

Integrated with Ellucian
Ellucian Elevate™

Elevate is the only management software designed specifically for Continuing Education and Workforce Development Program Administrators. Elevate gives users the power to manage, report, and market their programs, their way—ultimately maximizing performance and driving increased enrollment.
Banner® Data Defense instills a comprehensive security strategy that protects against unauthorized activity or access to sensitive information. Plus, it’s tailored to Banner® by Ellucian—built by Banner experts for Banner customers, so it provides the most intimately aligned security strategy possible. Based on Oracle-developed data and network encryption Banner Data Defense offers:

Encryption package
• Encodes data in transit and at rest to prevent unauthorized access to information.

Audit tool
• Provides alerts and reports that help you craft gold-standard policies across all databases.

Database firewall
• Monitors for malicious intent and provides the first line of defense against database-specific attacks and SQL injections.

Expert implementation
• By Ellucian services team, expert in data security for Ellucian ERP systems
Ellucian cloud solutions developed to solve unique challenges of colleges and universities

1400+ higher education clients in the cloud

- Mobile clients: 678
- Financial Aid needs analysis clients: 648
- Cloud services clients: 122