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Banner® by Ellucian

Banner® Technical: Extending Banner 9 administrative applications

This course equips the technical software professional to do basic extensions of Banner® 9 administrative application forms, known as Internet Native Banner (INB) forms in Banner 8.x versions. The Java-based Banner 9 app technology is introduced, and the extensibility, much of which involves the use of wizards, is presented in practical, hands-on labs.

COURSE OBJECTIVES
This course will concentrate on the use of the MVC Design Model in Banner 9 administrative applications. The hands-on labs will detail:

1. How to add database fields, calculated fields, and drop-down data entry boxes
   » Add an audit field (data origin of the record) to the position (NBAPOSN) form
   » Add a campus field association to a position and make this field a list-of-values (lov) drop-down box
   » Add a calculated average salary field to the NTRSALA form

2. How to add alerts (pop-up boxes) and fields based on logic
   » Add a field and an alert to the position form that would indicate whether the position has an existing requisition

3. How to hide fields on forms

TARGET AUDIENCE
Software technical professionals working with Banner. This includes development, database administrators, and administrative team members.

PREREQUISITES
To complete this course, you should have successfully completed the Java/OO programming course or have comparable knowledge.

Banner® Technical: Using Ellucian Solution Manager

Ellucian Solution Manager is a tool for downloading, installing, configuring, and managing Ellucian software, including Banner®. In this session, you’ll get a comprehensive overview of Ellucian Solution Manager and its capabilities. In the lab, you’ll install Ellucian Solution Manager and use its self-update feature to upgrade it to the current release; use Ellucian Solution Manager to download, install, and deploy Banner releases; and learn about provisioning a new Banner environment from scratch.

COURSE OBJECTIVES
This pre-conference course will cover the following:

Part 1: Installing Ellucian Solution Manager
» Overview of Ellucian Solution Manager
» Installing Ellucian Solution Manager base version 1.5
» Upgrading Ellucian Solution Manager 1.5 to current
» Installing Jenkins
Part 2: Upgrading using Ellucian Solution Manager
» About Ellucian Solution Manager and upgrades
» Defining existing Banner environments to Ellucian Solution Manager
» Upgrading Banner via Ellucian Solution Manager
» Deploying applications and Banner online help

Part 3: Provisioning using Ellucian Solution Manager
» About Ellucian Solution Manager and provisioning
» Provisioning templates
» Banner provisioning template requirements
» Running a provisioning job

TARGET AUDIENCE
Banner administrators, system administrators, and database administrators

PREREQUISITES
To complete this course, you should have experience with UNIX / Linux and Microsoft Windows desktop.

Banner® Financial Aid: Processing overview for new users

Are you new to Banner® Financial Aid? Would you find it helpful to understand the processing cycle of the Banner Financial Aid system? This course will go through the main processes in Financial Aid from data load through disbursement. Although processing can be different at each institution, understanding the big picture will make your job easier. In this session, we’ll run the processes and explain what each process does. There will be time for questions on each topic and we’ll also direct you to the proper resources to find the answers you need after the session.

COURSE OBJECTIVES
During this course, participants will learn:
» How electronic data exchange records are loaded into the Banner Financial Aid system
» How to assign tracking groups, budgeting groups, and packaging groups
» How to complete verification
» How to award Pell and other federal, state, and institutional funds
» How to create direct loan originations
» How to report Pell and direct loans to the U.S. Department of Education Common Origination & Disbursement
» Disbursement processing
» How to create population selections to use for Banner Financial Aid processing
» Tips and tricks for troubleshooting issues, and best practices
» Resources

TARGET AUDIENCE
Banner Functional or Banner Technical staff new to processing and supporting Financial Aid.

PREREQUISITES
To complete this course, you should have an understanding of Banner Navigation.
Banner® 9: Extensibility workshop

Gain a better understanding of the extensibility tools available within Banner® 9. Leverage those tools to build working examples that can serve as the foundation for your own custom extensions and supplemental programs.

COURSE OBJECTIVES
This workshop will cover the following topics:
» Overview of Banner 9 extensibility tools
» Supplemental Data Engine (SDE)
» Administrative page extensions
» Page Builder development
» How to configure page components
» Theme Editor
» Other extensibility tools available

TARGET AUDIENCE
This technical, hands-on workshop is intended for Banner administrators, database administrators, and application developers responsible for extending Banner environments or providing custom functionality.

PREREQUISITES
Participants should be experienced with Banner, operating system commands, Java programming, and have access to privileged OS and database accounts. Attendees must provide their own laptop and have completed the following:
» Banner 9 administrative applications developed in a development environment
» Banner database access with permissions to create new schemas, tables, and fields
» Banner Extensibility Page Builder installed and configured
» Banner Theme Editor installed and configured
» Banner Theme Server configured
» Complimentary extensibility courses and associated steps
» Requested GIT access, installed GIT client on laptop, and configured per documentation
Colleague® Studio: Journey through forms, concepts, debugging, and code management

Tour the key features of Envision programming through Colleague® Studio, examining the steps to create files and fields, how to navigate and design Colleague forms, how to create and update batch processes, and finally, how to write procedure hook code to execute a batch process or report. Experience the functionality of the Colleague Studio debugger and the tools that manage and control the development of custom software. This session is a refresher for those who have attended Envision Tool Kit or Colleague Studio training and provides a good overview of Colleague Studio programming for those who are new to it.

COURSE OBJECTIVES
When you complete this pre-conference session, you will be able to:
» Create a UI form to maintain data in a file you modify by adding data elements
» Create a subroutine and write the Envision basic code to read and display information about a person on a UI form
» Add procedure statements to a UI front-end form to process a report and add Envision basic code to the report process to output the data
» Manage custom code using Colleague Studio custom code management tools and discuss the Colleague release system
» Use the Colleague Studio debugger to debug a subroutine, UI form, batch or report process, and a web form

TARGET AUDIENCE
Technical professionals interested in programming/development

PREREQUISITES
To complete this course, you should have familiarity with Colleague and Colleague Studio.
Ellucian CRM Recruit

Utilize features and functionality to implement admissions best practices

Are you new to Ellucian CRM Recruit, or just want to utilize the tool more efficiently? Come join us for a multi-day session geared toward admissions counselors, enrollment staff, and functional users. The session will highlight best practices for personalized recruiting and admissions, trends related to recruitment technology, and a deeper dive into the function and fit of Ellucian CRM Recruit. Be prepared to review your campus recruiting goals while learning the power of advanced finds, duplicate detection, campaigns, reporting, and raising the level of urgency and effectiveness among staff.

TARGET AUDIENCE
We recommend functional users, admissions counselors, recruiters, and enrollment officers attend this session. This session is best when attended by a collaborative team from campus.

PREREQUISITES
To complete this course, you should be a current Ellucian CRM Recruit 4.x user responsible for day-to-day admissions tasks including those for counselors and admissions operations.
Ellucian CRM Advise

Utilize features and functionality to implement early engagement best practices

Wonder if you’re getting the most of Ellucian CRM Advise? Trying to build early engagement with your campus community, but not sure if it’s working? Come join us for a multi-day session geared toward student success or early engagement team members charged with increasing student retention. The session will revisit your campus goals and strategies identified during Ellucian CRM Advise implementation and outline next steps to reach success for the populations. Using your campus goals as a guide, you’ll take a deeper dive into Ellucian CRM Advise functionality and understand the power of advanced finds, duplication detection, success scoring, and more.

TARGET AUDIENCE
We recommend functional users, like advisors, success coaches, faculty, and coordinators, attend this session. This session is best when attended by a collaborative team from campus.

PREREQUISITES
To complete this course, you should be a current Ellucian CRM Advise 1.7 or higher user responsible for day-to-day tasks associated with early engagement or student success.
Utilize features and functionality to increase continuing education and workforce development revenue and enrollment, and operationalize professional practices

Are you new to Ellucian Elevate™, or just want to utilize the tool more efficiently? Come join us for a multi-day session geared toward continuing education and workforce development staff responsible for driving recruitment, enrollment, registration, and administrative assignments, and functional users. The session will highlight professional practices for maximizing course attendance, analyzing course performance, on-demand course management, and continuing education trends related to workforce technology, and dive deeper into the function and fit of Ellucian Elevate. Be prepared to review your campus continuing education or workforce development goals while learning the power of on-demand course management and out-of-the-box integration.

**TARGET AUDIENCE**
We recommend functional users and all staff responsible for driving recruitment, admissions, enrollment, registration, and administrative functions in the context of continuing education and workforce development attend this session. This session is best when attended by a collaborative team from campus.

**PREREQUISITES**
To complete this course, you should be a current Ellucian Elevate user responsible for day-to-day continuing education and workforce development tasks.
Ellucian Ethos

Ellucian Workflow powered by Ethos

Ellucian Workflow powered by Ethos is a cloud-based business process management and workflow solution that empowers you to define and execute business rules outside the application. Ellucian Workflow can assist organizations of any size with designing, automating, and deploying business processes or workflows of various kinds. Ellucian Workflow provides the ability to access enterprise resource planning (ERP) data via Ethos integration. In this course, you will learn how to automate a business process from initial assessment to final delivery.

**PARTICIPANTS WILL LEARN THE FOLLOWING**

1. **Understand options for creating and maintaining users in Ellucian Workflow**

2. **Understand options for authentication of Ellucian Workflow users**

3. **Follow the rules of Business Process Mapping Notation to design and map business processes using Ellucian Workflow**

4. **Create a workflow that is initiated by changes in ERP data available via the Ethos data model**

5. **Create a workflow that reads and updates ERP data available via the Ethos data model**

6. **Learn how to include Ellucian Workflow functions to:**
   - Send emails
   - Create and monitor key performance indicators (KPIs)
   - Create and monitor service level agreements (SLAs)
   - Create and monitor dashboards
   - Create Word or PDF documents on the fly

**TARGET AUDIENCE**
Technical and/or power users from various departments around campus. Scripting/programming familiarity is preferred.

**PREREQUISITES**
None
REGISTER NOW!
San Diego
April 8–11, 2018