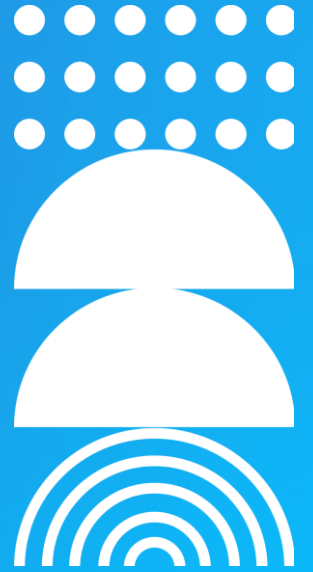


Product Roadmap in Focus

Dave Mutti, Senior Director, Product Management





- 01 SaaS Platform Approach**
- 02 A Look Back At 2023**
- 03 What's Next**

Disclaimer



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Ellucian SaaS Platform








Automatic Upgrades



A Unified End-to-End Ellucian Experience

Microservices power the solutions in the Ellucian SaaS Platform

Student Name	Projected Graduating Year	Program	FAFSA Status	Actions
<input type="checkbox"/> Andrew Ablu	2021	Nursing	INCOMPLETE	⋮
<input type="checkbox"/> Britney Atkins	2021	Chemistry	INCOMPLETE	⋮
<input type="checkbox"/> Craig Azaela	2021	Nursing	COMPLETE	LAUNCH OUTREACH
<input type="checkbox"/> Jennifer Bain	2022	Nursing	INCOMPLETE	⋮
<input type="checkbox"/> Steven Bush	2023	Mathematics	INCOMPLETE	⋮
<input type="checkbox"/> Stella Carlson	2021	English	INCOMPLETE	⋮

-  **Insights (GA)**
Delivered reports utilizing a SaaS data platform
-  **Project Maestro (Select, GA for Task Q2)**
Automate common business processes (tasks, approvals, forms)
-  **Data Connect (GA)**
Integrated data is called at any point within experiences
-  **Business Rules Engine (Beta Q3)**
Automate decision making based on business policies
-  **Communicate**
Email, Notifications, Announcements (GA)
Communication Campaigns (Q2 beta)
SMS communication services (Q3 Beta)
-  **Person (GA in Cross Reg & Apply, all in Q1)**
Centralized repository for person information
Person Matching
-  **Document Management (Directional)**
Multi-tenant document storage, processing, security



Product Roadmap in Focus

A look back at 2023

HESA Data Futures

HESA submission milestones

- 50% Submission: May 23
- 90% Submission: August 23
- Full Submission: October 23 onwards
- Data Connect Pipelines utilized to send data
- Ellucian Experience used to view and manage HESA data pipeline
- Excellent Collaborative Engagement
 - HESA attendance at Focus Group



Structured Progression

- Solution released in March 2023
- Banner Student and Ellucian Experience
- Further release of functionality in July 2023 included
 - Anonymous Boards
 - Enhanced Search for Boards that a student is attached to
 - Additional check at stage level for 'carry-forward' courses

Structured Progression: Modelling complex academic regulations at the University of Birmingham

*Wednesday 21 February, 10:30
Chris Boshell (University of Birmingham)*



A00267319 | Stage 1 | BSc Structured Progression

UNLOCK
APPROVED
ROLLED

65

Stage Average

..

Overall GPA

Stage: 1 ▼ Audit History

Progression Outcome	Classification Outcome
Calculated On: 14/04/2023, 02:43:58 PM	Calculated On: ..
Job Status: ROLLED	Job Status: ..
<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Progression Status Summary ▼ </div>	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Classification Status Summary ▼ </div>
Current Progression Outcome: Pass Progress	Current Classification: ..
Proposed Progression Outcome: Pass Progress ▼	Proposed Classification: ..
Stage Credit Required: 120	Overall Credit Required: ..
Stage Credit Attempted: 120	Overall Credit Attempted: ..
Stage Credit Earned: 120	Overall Credit Earned: ..
Compensated Credit Earned: 30	Classification Rule Number: ..

Comments

 **Martin Woolley**
19/06/2023, 01:41:43 PM

Additional information come to light

 **Martin Woolley**
16/05/2023, 04:14:50 PM

Additional test of changing Progression Outcome

 **Martin Woolley**
16/05/2023, 04:12:59 PM

Testing change of Progression Outcome


Ellucian Apprenticeships

- Solution released in April 2023
- Banner Student and Ellucian Experience
- Expanding academic model support
- Tri-partite solution to jointly monitor progress
 - Apprentice, Employer, Provider personas
- Training Plan, Progress Reviews, Extra Curricula Activity recording
- Separate ILR functionality to support UK statutory return

DEGREE APPRENTICE PROFILE

← Commitment Statement

✓ Cover Sheet
✓ Policies
✓ Commitment to the Programme
4 Plan of Training





Isaac Burman

Trainee Police Constable | Economics Major

Date of Birth 29/09/1999

Student ID A00037752

Apprentice Programme Details		Off the job Calculation	
Apprenticeship Programme Type	Policing	Apprenticeship Normal Working Hours Per Week	40
Apprenticeship Programme Name	Policing Degree Apprenticeship	Weeks On Programme	52
Apprenticeship Framework/Standard Name	Policing Constable Degree ST0304	Less Annual Leave Entitlement	6
Reference Number/Version	15484231564	Minimum 20% Calculations	384
Apprenticeship Level	6		
Apprenticeship Start Date	28/09/2020		
Practical Period Start Date	27/10/2020		
Practical Period End Date	25/05/2026		
Apprenticeship End Date	28/09/2020		

[AMEND](#)

Recognition of Prior Learning

Use this section to describe and evidence any prior learning assessment made against the standard. This can include work experience, prior education, training or qualification in a related sector subject area.

Comments

English/Maths

Use this section to describe the outcome of any assessment of English and maths and the support deployed as a result

Comments

Learning Support

Use this section to describe the outcome of any learning support assessment made and the support deployed as a result

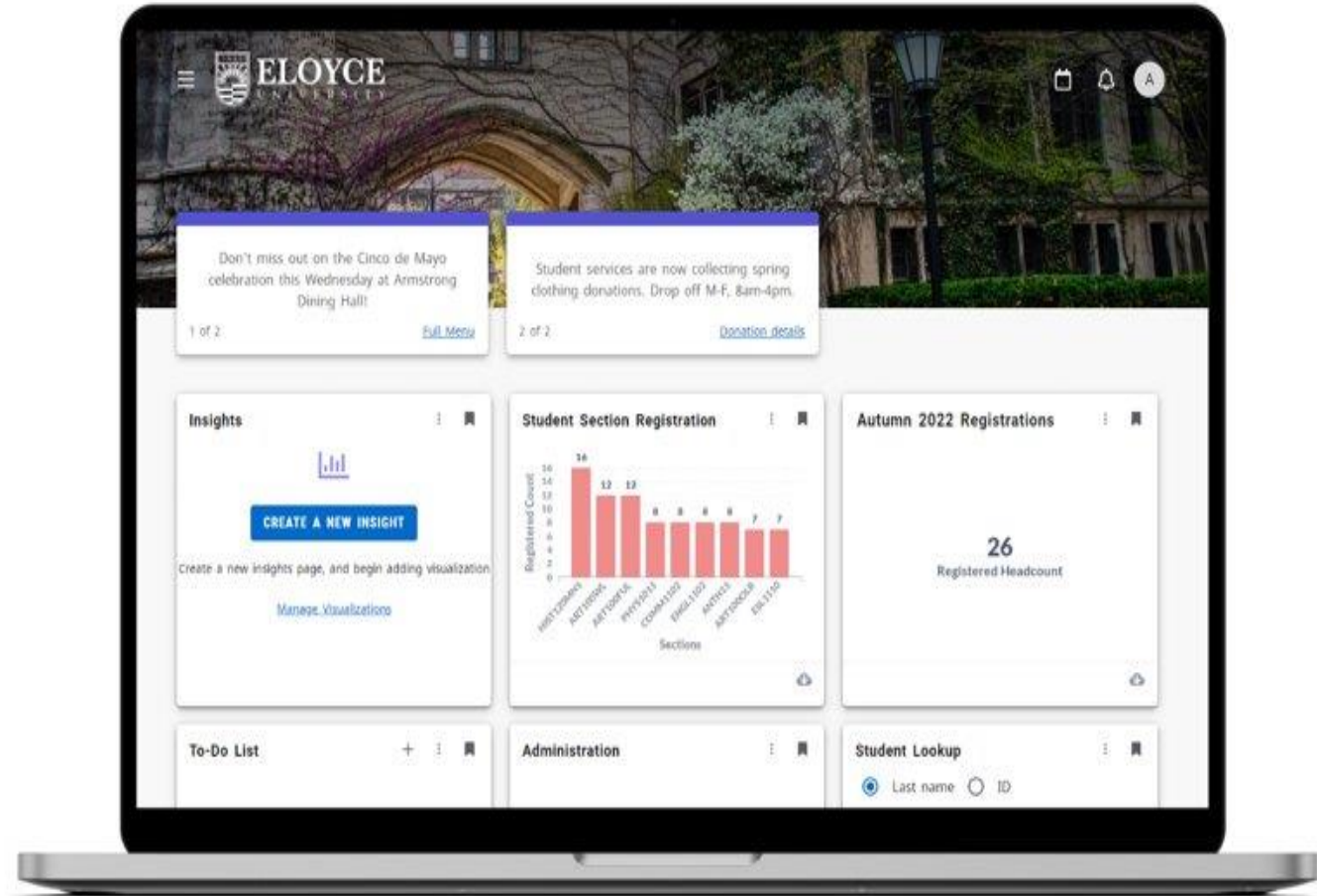
Ellucian Insights

- Unified operational reporting and analytical insights data platform
- Leverage Ellucian data sources and any third-party data sources
- Utilise Ellucian's visualisation layer or BYOT
- Democratise and personalise your data
- Fast paced evolution

Ellucian Insights: More than just a reporting tool

Tuesday 20 February, 16:40

Esther Winter (Solutions Consulting, Ellucian)





Product Roadmap in Focus

What's Next

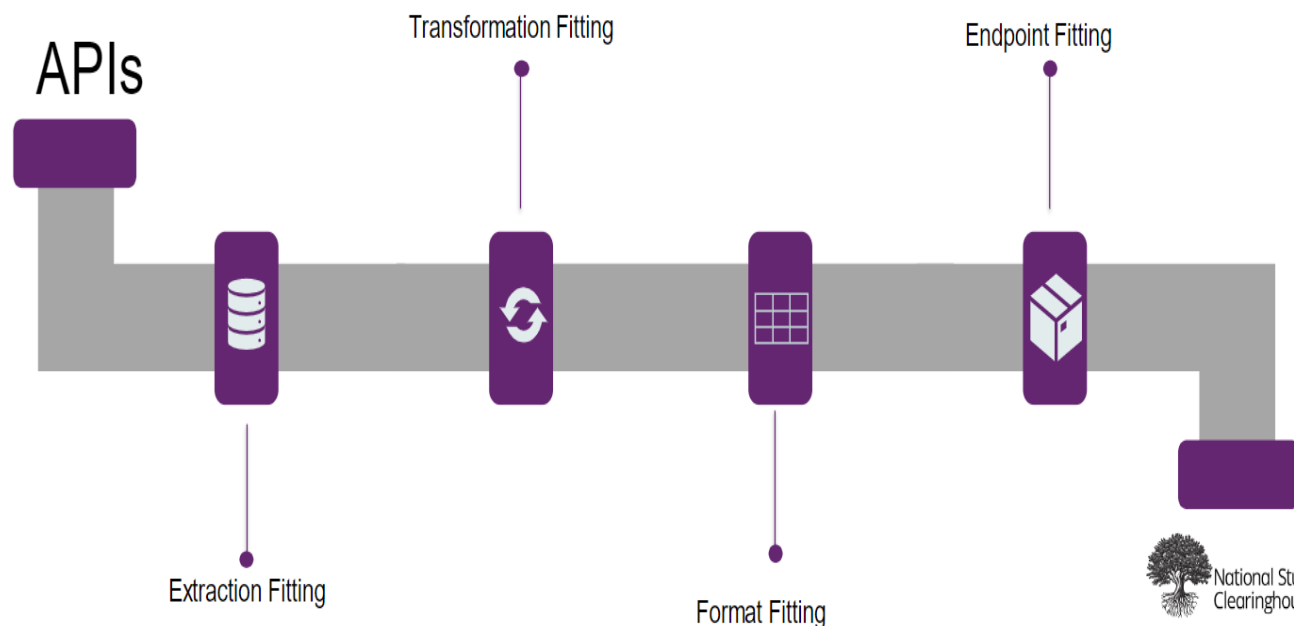


Data Connect

- Low code solution to quickly build integrations without maintaining on-premise infrastructure.
- Core component for Regulatory Compliance capabilities
- Data Maps simplify integration mapping change needs
- Sub-pipelines to extend Ellucian-delivered packages and promote reuse

WHAT'S NEXT

Pipeline



Ellucian Intelligent Processing

SaaS Safe Action Item Processing

No-code workflow designer

- Simple Tasks
- Person Hold (Add/Remove)
- Flow Controls (Splits)

Triggers

- Scheduled Start for a population
- Banner Population Selection

Introducing Project Maestro: Automate Tasks and Holds

Tuesday 20 February, 16:40
Sarh Desai (Product Manager, Ellucian)

The screenshot displays the Maestro Workflow Designer interface for 'Pre-Registrations Tasks'. The workflow consists of the following steps:

- Scheduled Start** (Trigger)
- Add Person Hold** (Action)
- Accept Payment Responsibility** (Action)
- Tuition Statement Consent** (Action)
- Remove Person Hold** (Action)
- End** (Final Step)

The interface includes a left-hand menu with categories: Tasks (Simple, Approval, Form, External), Integrations (Add Person Hold, Remove Person Hold, Action), and Flow Controls (Split). The right-hand panel shows the 'Simple Task Properties' for the selected 'Accept Payment Responsibility' task, including fields for Name, Description, Task Details, Task Outcomes, Default Action, Assignment, and Due In.

Admissions

- UCAS deprecation of ODBC in 2023
 - Quercus Re-design completed using Data Connect
 - Agnostic pipelines usable with Banner
- 2025/6 cycle changes in progress
- UCAS Link initial release in June 2024
 - Dual models in operation
 - Modern contextualised data service
 - RPA for bulk Uploads
- DfE Teacher Apply version 1.5 or 2.0

UCAS-Link: How are Ellucian going to solve the dual running conundrum?

Wednesday 21 February, 12:00
Carol Ebbrell (Product Manager, Ellucian)

The screenshot shows the 'Integration Packages' section of the Ellucian interface. The top navigation bar includes 'Home', 'Integration Packages', 'Crosswalks', and 'Settings'. The 'Integration Packages' tab is active, displaying a list of packages under the heading 'PACKAGES'. The 'UCAS XML LINK' package is selected, showing a list of individual pipeline items with their respective versions. To the right, a detailed view of the 'UCAS XML LINK' package is shown, featuring a table of pipeline names and their versions.

Pipeline Name	Version
Xml-link UCAS Applicant Data GET	0.0.2
Xml-link UCAS Applicant Data SET	0.0.1
Xml-link UCAS Password Expiry GET	0.0.2
Xml-link UCAS Password SET	0.0.2
Xml-link UCAS Reference Data GET	0.0.2
Xml-link UCAS Results GET	0.0.3
Xml-link UCAS Results Match GET	0.0.2
Xml-link UCAS Results Refresh GET	0.0.3
Xml-link UCAS Unicode Applicant Data GET	0.0.1
Xml-link UCAS Units GET	0.0.2

HESA Data Futures

- Remaining coverage rules delivered
- Reported changes for the C23056 return
- Import Expected Engagement File
- Monitoring further HESA changes
 - ITT, Graduate Outcomes, Discover Uni
- DfE replacement of HESA ITT from 2025/26
- Face to Face Focus Group: 15 March 2024 at Nottingham Trent University

HESA Data Futures: Reducing the Burden

Wednesday 21 February, 10:30

Helen Bailey (University of Central Lancashire)

Andrea Baldini (Nottingham Trent University)

Helen Ferneyhough (Product Manager, Ellucian)

The screenshot shows the 'Job Detail' page for 'HESA Data Futures 22-23 - HF'. The job status is 'BUSY'. The integration package is 'HESA DATA FUTURES STUDENT'. The pipeline is 'HESADFEExtraction'. The core.jobDetail.version is 2.0.5. The job ID is 64253dc92495657cff94125. The job was created on 30/03/2023 at 8:44:09 BST and updated on 01/12/2023 at 15:22:35 GMT. The maximum concurrency is 50 and the HTTP request timeout is 3 minutes. The table below shows the job runs.

Job Run ID	core.jobDetail.run.table.version	Start	End	Progress Summary	Status	Errors	Actions
6569fa3b3dddf410e52e8e6a	2.0.5	01/12/2023, 15:22:36 GMT		PHASE 1 OF 3	RUNNING		
6569f9e6935afb8737388861	2.0.5	01/12/2023, 15:21:10 GMT	01/12/2023, 15:22:14 GMT	COMPLETED	SUCCEEDED		
6569f8293dddf410e52e8cea	2.0.5	01/12/2023, 15:13:46 GMT	01/12/2023, 15:14:48 GMT	COMPLETED	SUCCEEDED		
6569f729f246e0f04df7e4e3	2.0.5	01/12/2023, 15:09:30 GMT	01/12/2023, 15:10:33 GMT	COMPLETED	SUCCEEDED		
6569f51b3dddf410e52e89fd	2.0.5	01/12/2023, 15:00:44 GMT	01/12/2023, 15:02:02 GMT	COMPLETED	SUCCEEDED		
6569f48e935afb87373883b7	2.0.5	01/12/2023, 14:58:23 GMT	01/12/2023, 14:59:25 GMT	COMPLETED	FAILED	VIEW ERRORS	
6569f1a7f246e0f04df7e0f2	2.0.5	01/12/2023, 14:45:59 GMT	01/12/2023, 14:47:17 GMT	COMPLETED	SUCCEEDED		

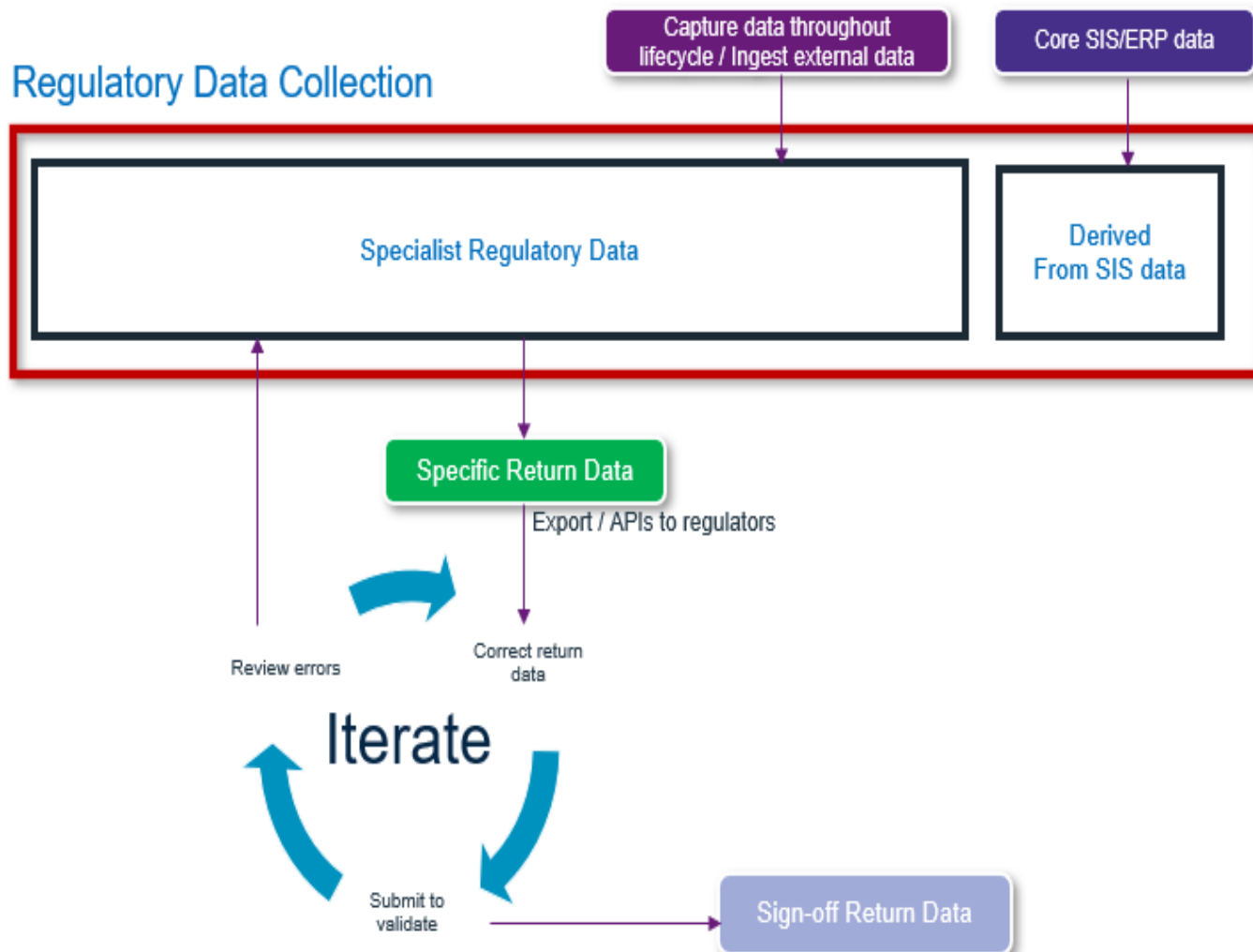


Regulatory Simplifier

- Applying the capability approach to Regulatory Returns
- SIS agnostic solution
 - Build once and reuse
- Providing a faster way to create and maintain Regulatory Returns
 - No code extensions
 - Metadata driven UX
 - Simpler mechanism for processing iterative schema changes
 - Greater control for the Data Return persona
 - Data stored in the SIS only where required for non-regulatory business operations

WHAT'S NEXT

Regulatory Data Collection



Regulatory Simplifier

- Solution will provide
 - Mechanism for data capture and ingestion
 - Specialist data store
 - Data validation
 - Data correction and submission
- Discover Uni (Unistats): first course-based return being developed
- California Chancellor's Reports: first student-based returns being trialed
- Beta release planned for late Q2 2024

The Future of Regulatory Returns

Wednesday 21 February, 11:20

Carol Ebbrell, Helen Ferneyhough (Product Manager, Ellucian)

CONFIDENTIAL AND PROPRIETARY

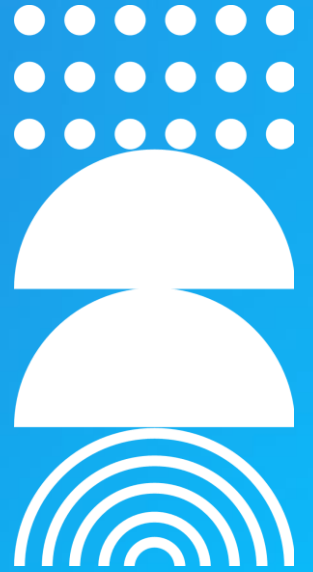
The screenshot shows the 'Ellucian Regulatory' application interface. At the top, there's a navigation bar with 'Home' and utility icons. Below it, the main title 'Ellucian Regulatory' is displayed. The interface is divided into sections for filtering and data display.

Filtering Section:

- Return Types:** Includes tabs for 'Return Types', 'Course', and 'Location'. Below these are dropdown menus for 'Regulator' (set to HESA) and 'Return Type' (set to DISCOVERUNI). There are 'LOAD' and 'CREATE RETURN FILE' buttons.
- Advanced Search:** Includes a 'Period (ERP)' dropdown, a 'Contains' dropdown, and an input field 'Enter the value' with a '+' button.
- Active Filter:** A pill-shaped filter for 'ACTIVE : YES' with a 'CLEAR FILTER' button.

Data Table:

Period (ERP)	Version (ERP)	File	Date Created	Created By	Updated By	Active	Locked	Final	Comments	Actions
▼ C24061 (2 items)										
	v1.0	demo_copy file	2024-02-02	Frank		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		⋮
	v1.0	Demo_20240115	2024-01-15	Frank	Frank	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		⋮



THANK YOU

Product Roadmap in Focus

Dave Mutti | Senior Director, Product Management



 **ellucian**
USER CONFERENCE

Europe

