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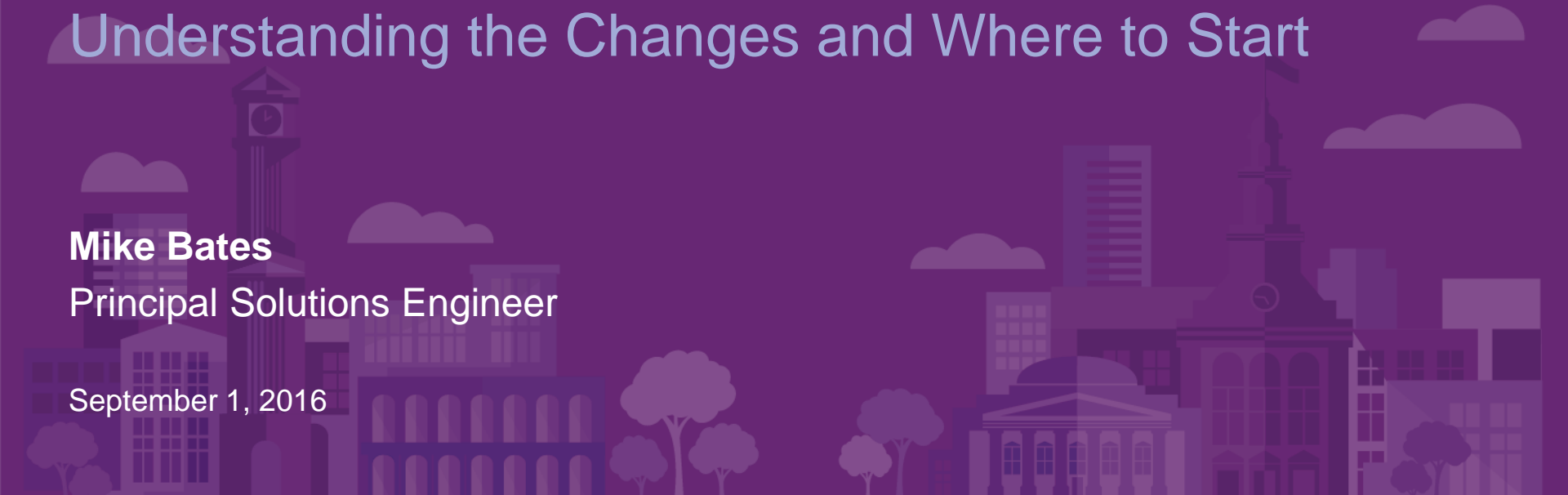
Diving into the Move to XE for Banner

Understanding the Changes and Where to Start

Mike Bates

Principal Solutions Engineer

September 1, 2016



Agenda

- 1** Banner 8 vs. Banner 9.x

- 2** Banner 8 and Banner 9.x Coexisting

- 3** Where to Start

- 4** Scenario Based Paths to Adoption

- 5** Resources for Getting Started

Banner 8 vs Banner 9.x

XE Strategy for Banner

A stylized, monochromatic illustration of a cityscape in shades of purple and blue. It features various buildings, including a prominent clock tower on the left, a classical building with a dome in the center, and a modern skyscraper on the right. There are also trees and clouds scattered throughout the scene.

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Banner 8

Identity Provider (CAS, Ethos Identity, etc.)

Banner Self-Service

Human Resources

General

Finance

Student
(A/R Financial Aid, Student)

Banner Administration

Human Resources

General

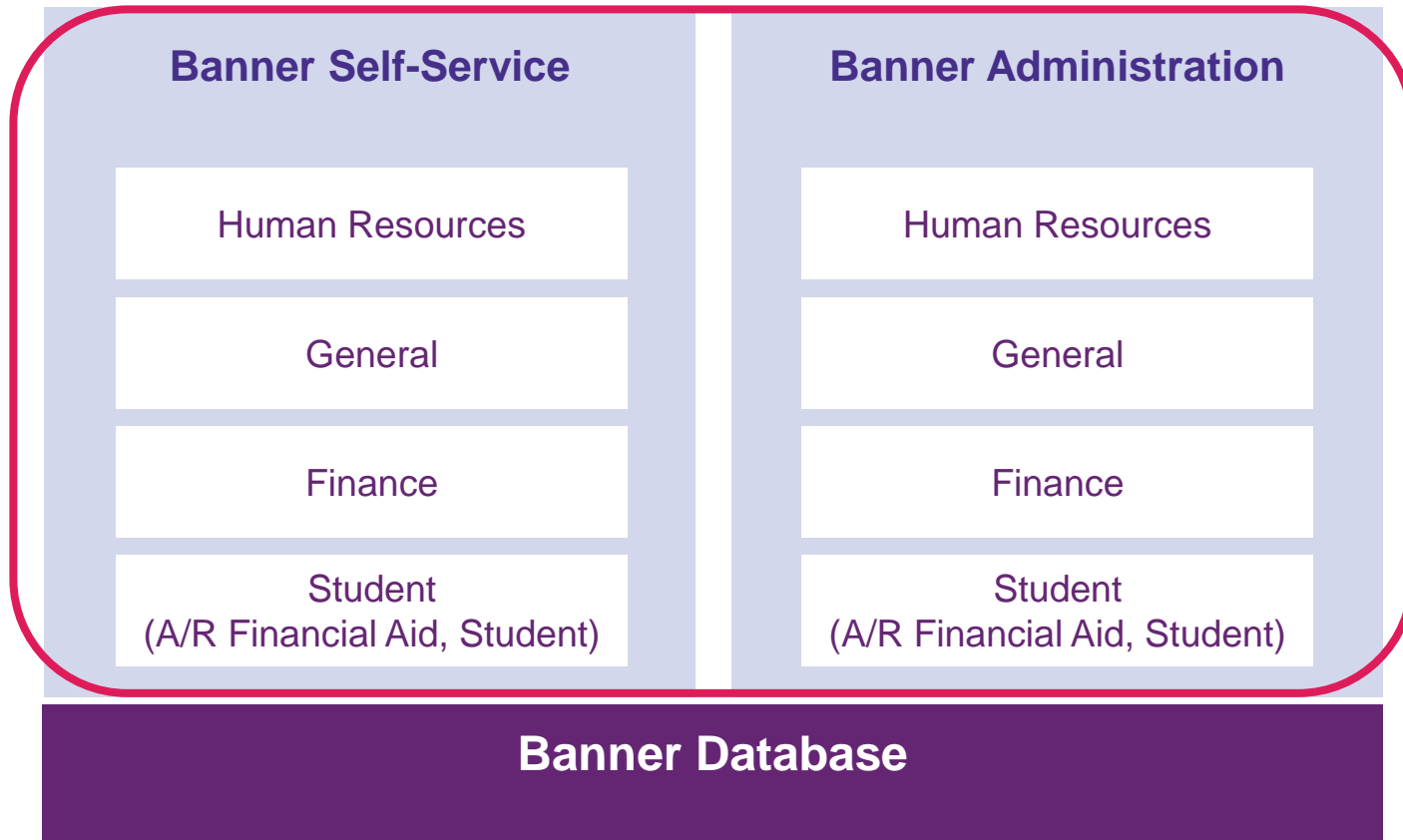
Finance

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Banner Database

Banner 8

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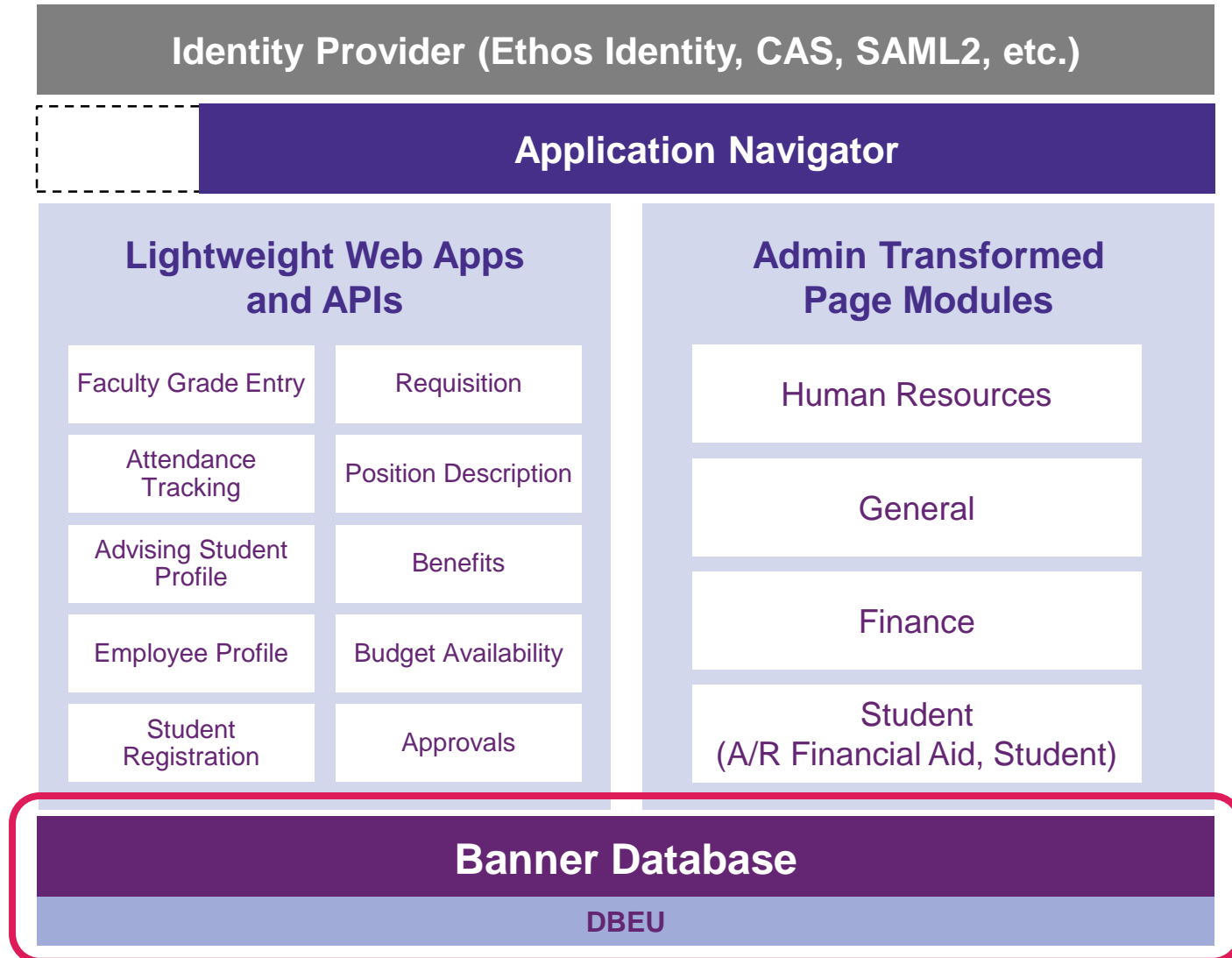
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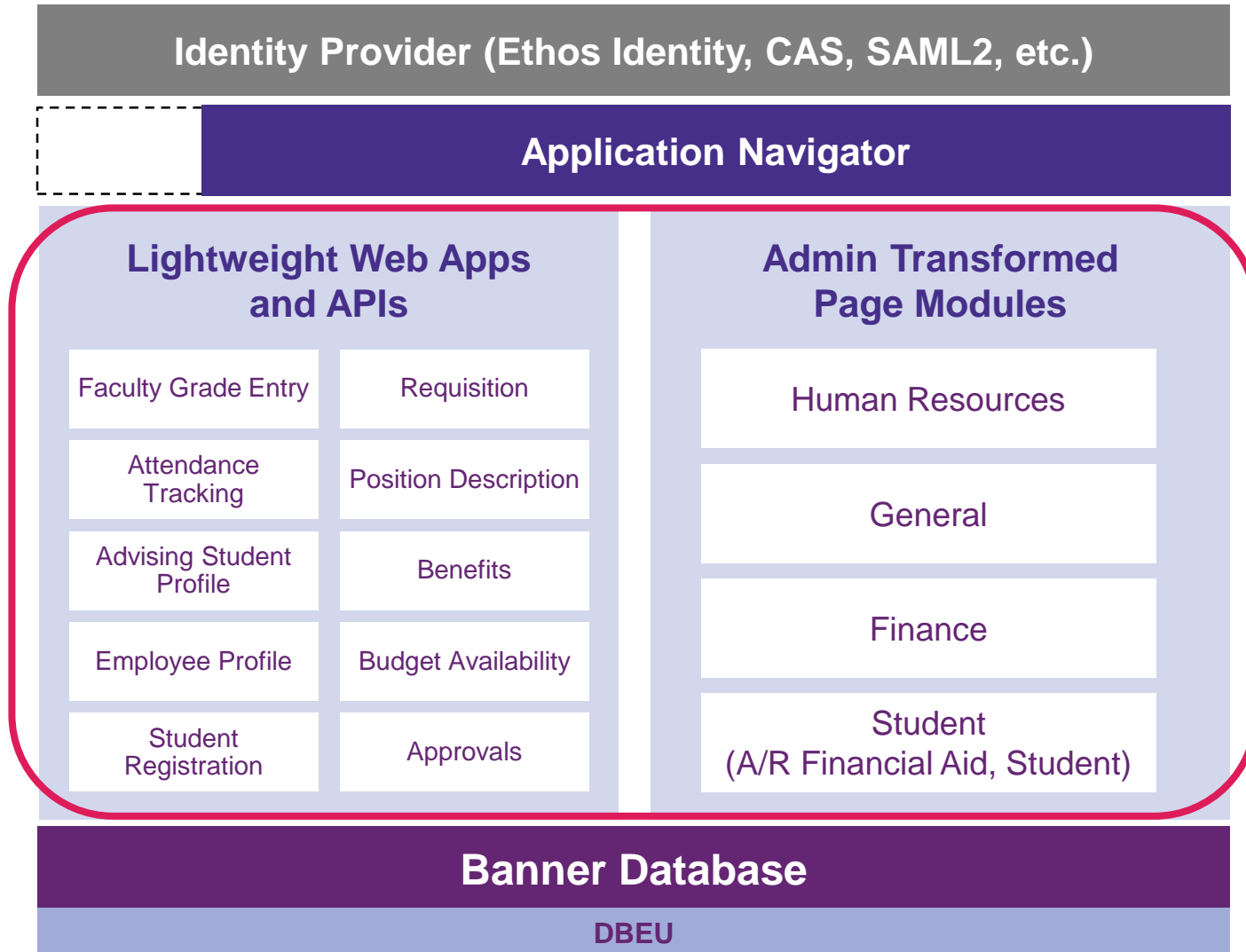
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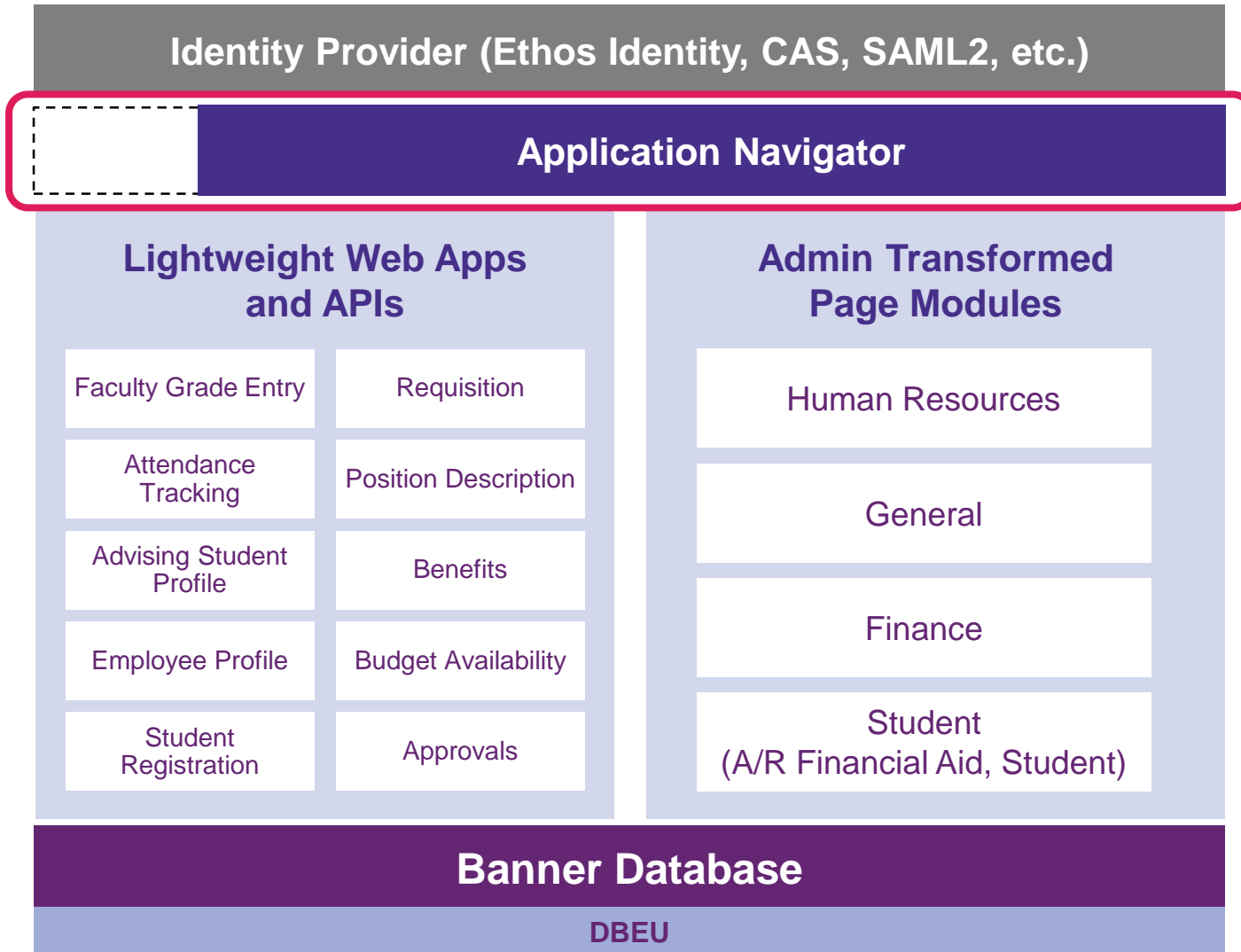
Banner 9.x powered by XE



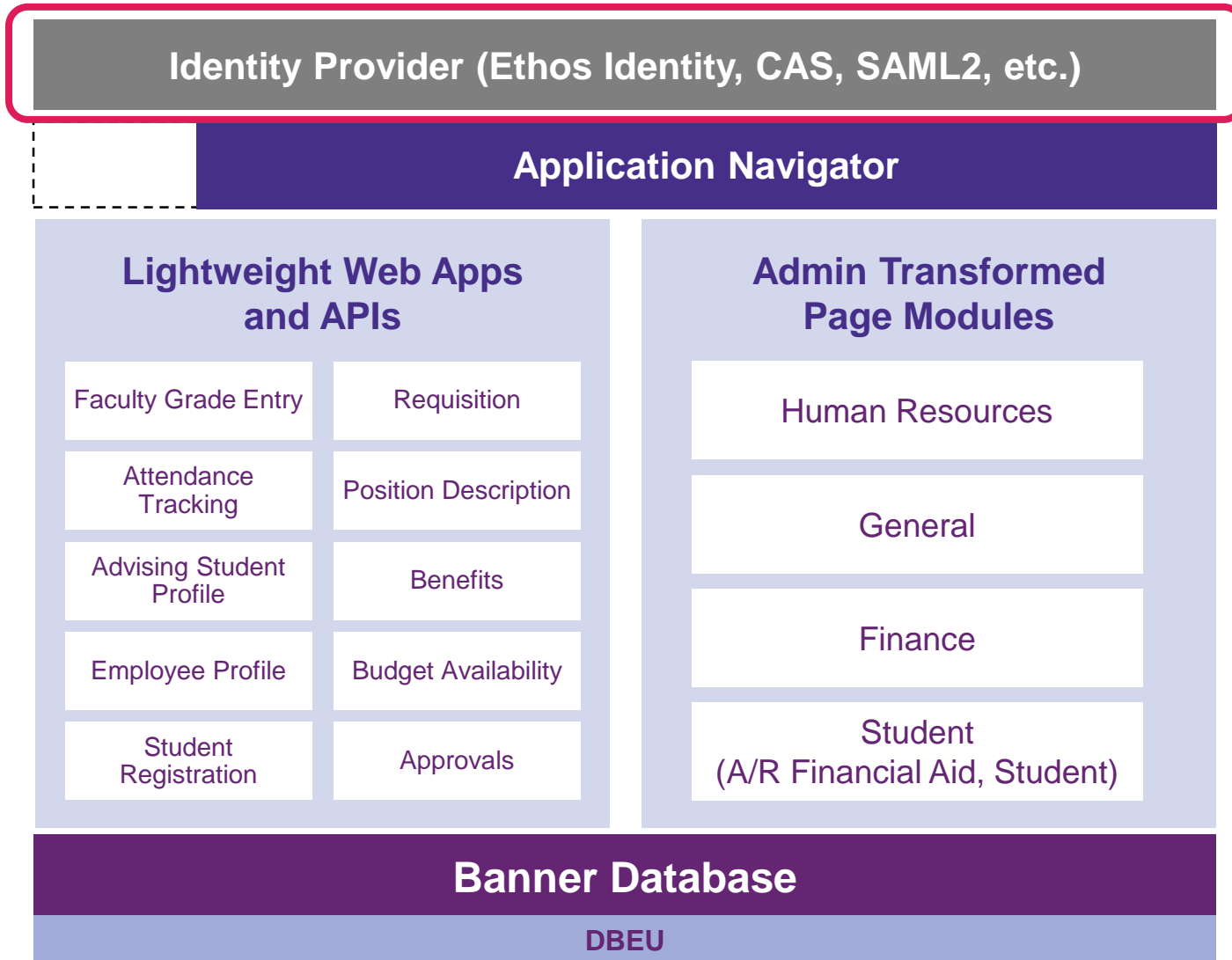
Banner 9.x powered by XE



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Banner 9.x powered by XE



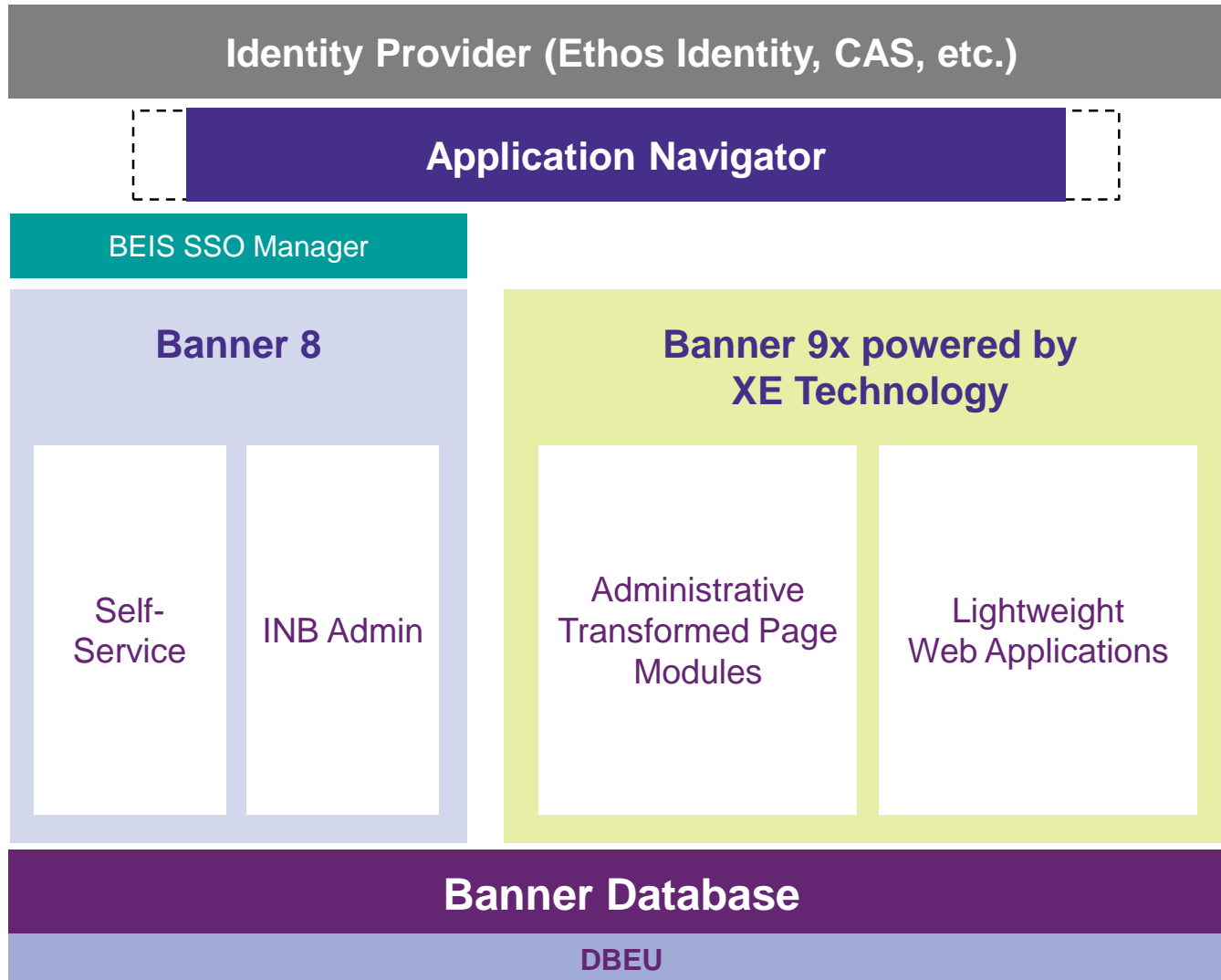
Banner 8 and Banner 9 Coexisting

XE Strategy for Banner

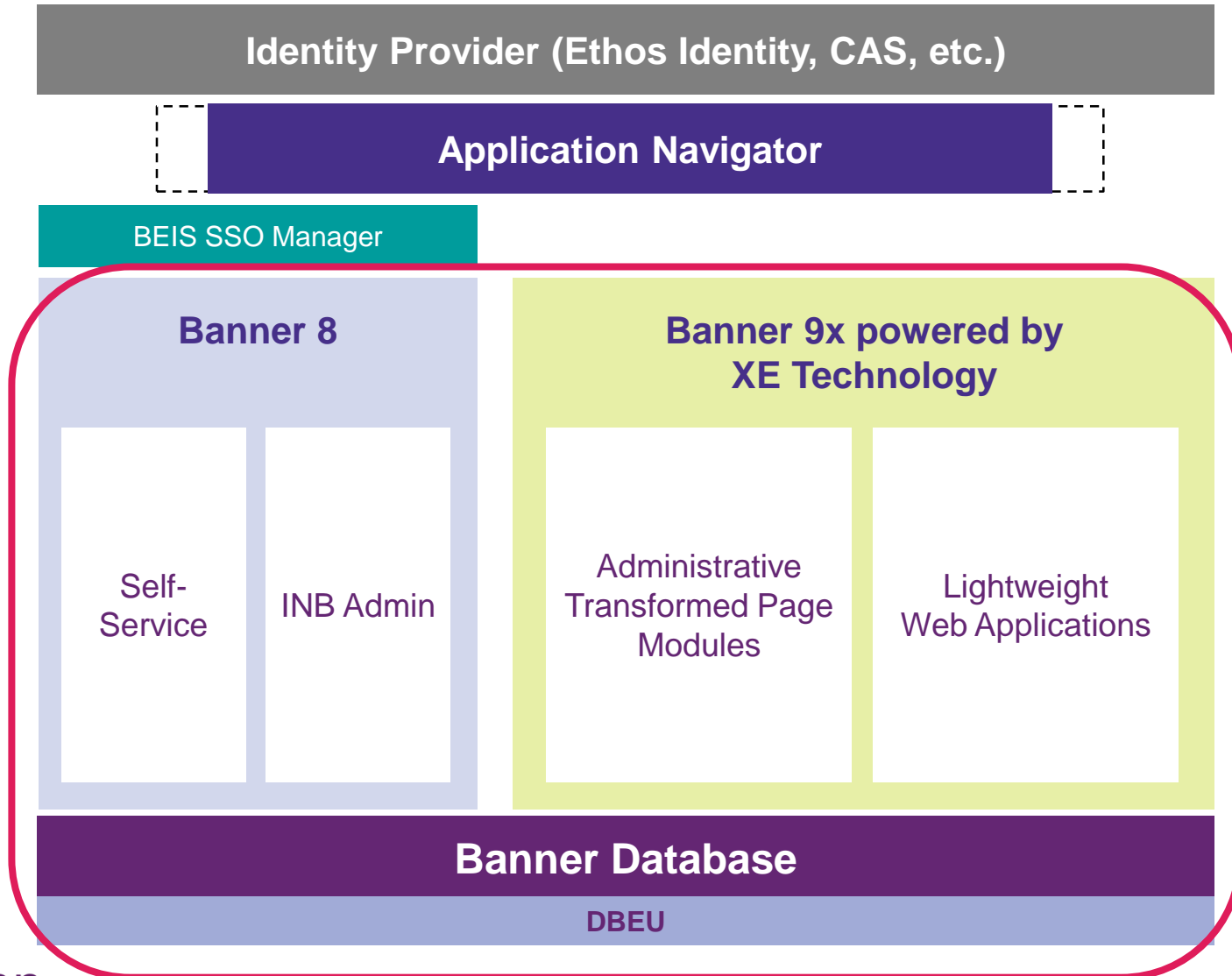
A stylized, monochromatic purple illustration of a cityscape at the bottom of the slide. It features various buildings, including a prominent clock tower on the left, a classical building with a dome in the center, and a modern skyscraper on the right. There are also trees and clouds scattered throughout the scene.

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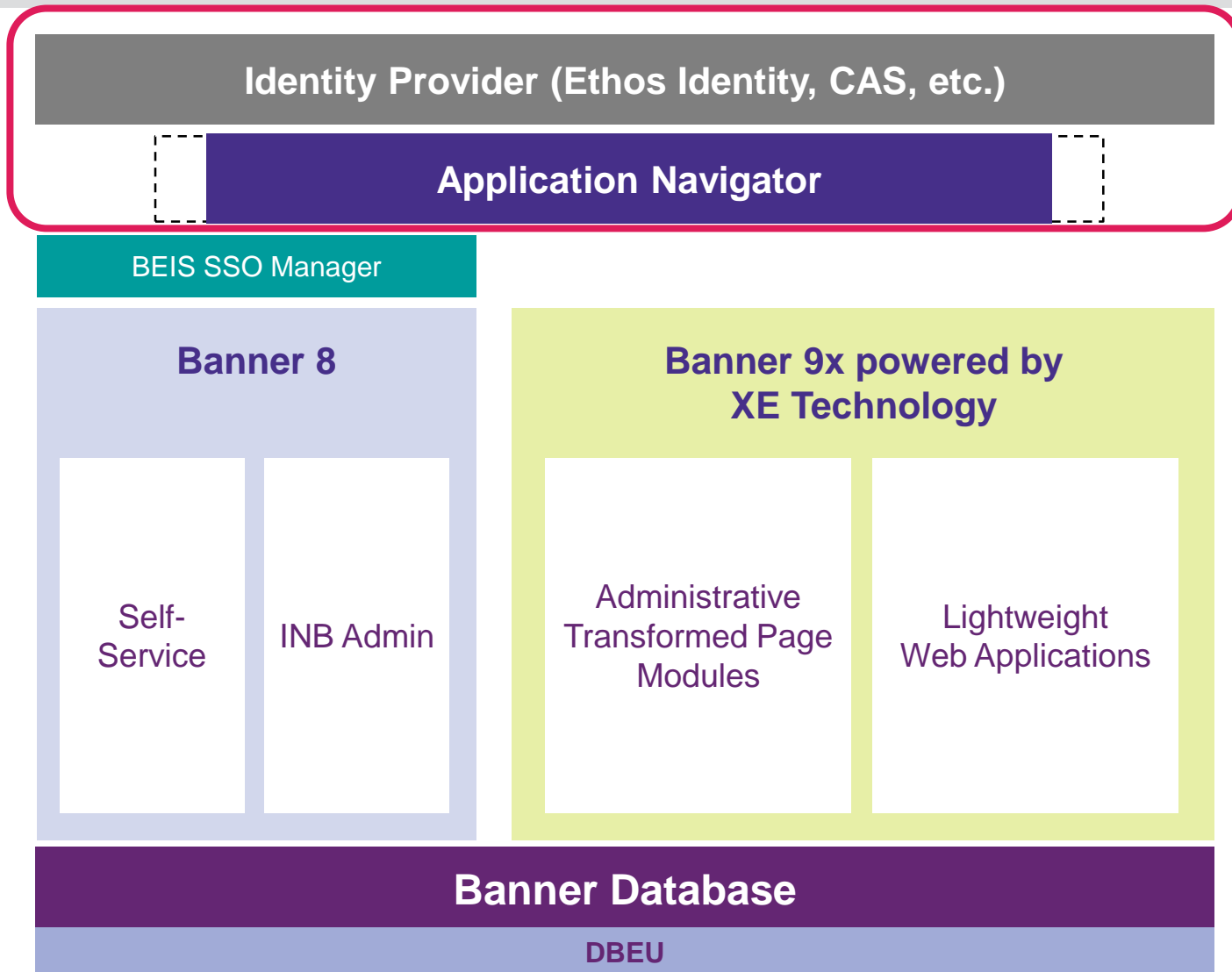
Coexistence and Evolution



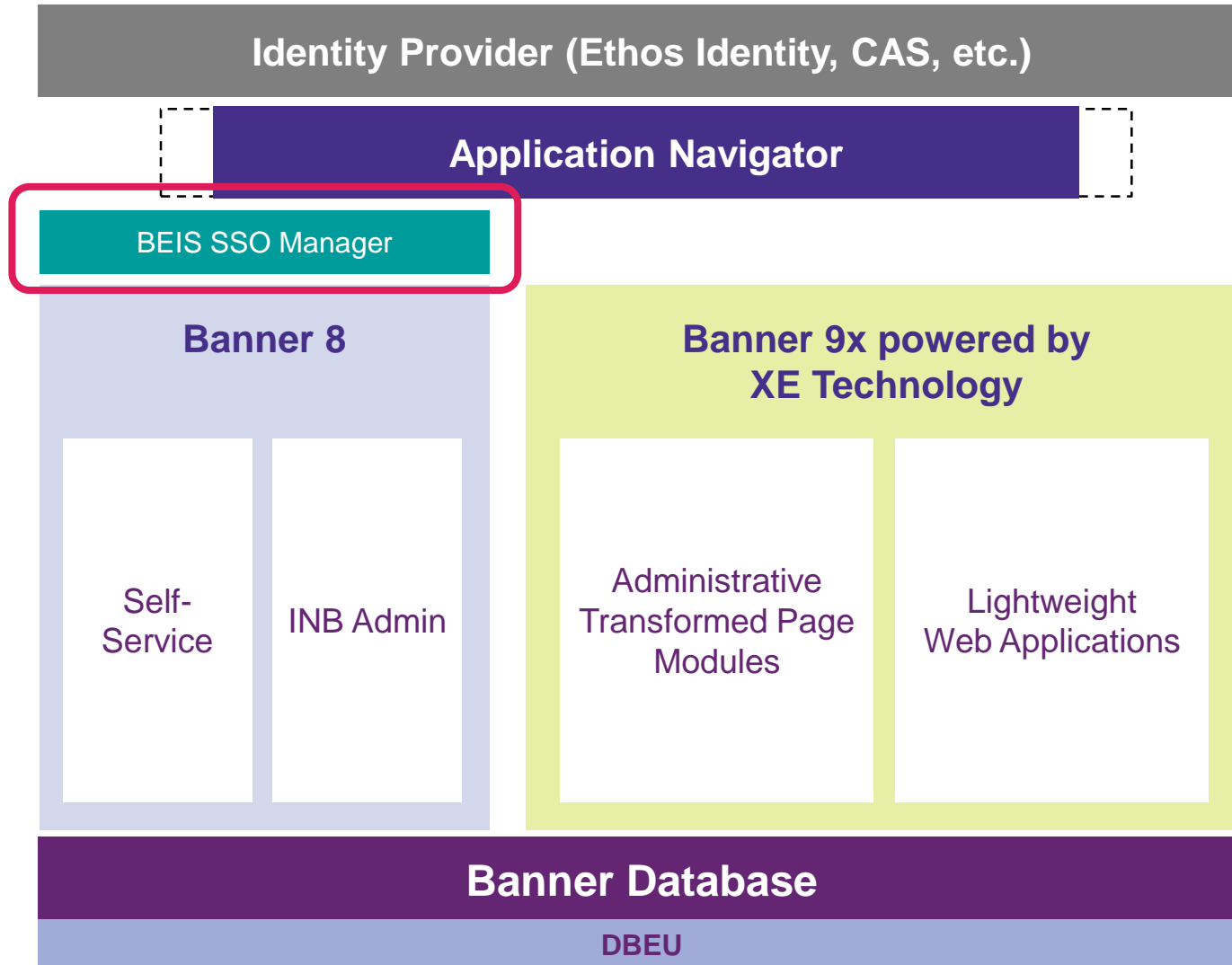
Coexistence and Evolution



Coexistence and Evolution



Coexistence and Evolution



Coexistence and Evolution

Tying 8 and 9 together: Identity Management and Single Sign-On

1. Banner 8 and Banner 9 can coexist, as long as single sign-on exists.
2. Application Navigator is a requirement to deploy Banner 9.x Administrative Applications.
3. Application Navigator requires single sign on to be configured via Ethos Identity Service or a CAS server.
4. The Banner 9.x applications support single sign on natively but Banner 8 INB does not. For Application Navigator to seamlessly move the user between 9.x Admin pages and Banner 8 INB, single sign on to Banner 8 must be in place.
5. Single sign on to Banner 8 requires SSO Manager as a gateway into INB and SSB.

Where to Start and Example Migration Scenarios

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Where to Start?

Start in BANNER 8

1. Identity Management and Single Sign-on
2. Ellucian Solution Manager (ESM)
3. Catalog and review all Banner customizations – if applicable
 - a. Retire customizations that are no longer required
 - b. Compare with new XE for Banner 9.x out of box functionality
 - c. Ellucian services are available to assist with business process review and comparisons with Banner 9.x out of box functionality
 - d. Upload remaining customizations to the XE Guide website forms analyzer tool for a work assessment
4. Select and install your first functional application
 - a. Employee Profile or Student Advising Profile are two examples

Scenario 1 – No Customizations but SSO is NOT enabled in Banner 8

Ordered steps to take:

1. Install EIS, SSO Manager, and enable single sign on in Banner 8
2. Install ESM
3. Determine which XE for Banner 9.x application to deploy first, ideally to address your strategic plan goals and primary business needs – if you are looking for a place to start, Ellucian recommends Student Advising Profile or Employee Profile
4. Determine hardware requirements for the new XE applications, provision them, and add them to ESM
5. Use ESM to apply any needed Banner upgrades, install and deploy your new Banner 9.x application

Why those steps are the best place to start

1. EIS delivers cross protocol support and end user password resets
2. ESM simplifies and accelerates upgrades and deployments

Scenario 2 – No Customizations and SSO is enabled in Banner 8

Ordered steps to take:

1. Install Ellucian Solution Manager in Banner 8
2. Determine if replacing the CAS Server with EIS would simplify SSO across the organization (usually true), but SSO with CAS will work
3. Determine which Banner 9.x application to deploy first, ideally addressing strategic plan goals – if you are looking for a place to start, Ellucian recommends the Student Advising Profile or Employee Profile
4. Determine hardware requirements for the new applications, provision them, and add them to ESM
5. Use ESM to apply any needed Banner upgrades, install and deploy the new applications

Scenario 3 - Some Modifications and SSO is NOT enabled in Banner 8

Ordered steps to take:

1. Install EIS, SSO Manager, and enable single sign on in Banner 8
2. Catalog and eliminate any un-needed Banner 8 Modifications
3. Install ESM
4. Determine which 9.x applications to deploy first, ideally addressing strategic plan goals – for your first application, if you can, choose an app that you can implement vanilla
5. Determine if any mods need to move into Banner 9.x and plan their re-design/conversion
6. Determine hardware requirements for the new 9.x applications, provision them, and add them to ESM
7. Use ESM to apply any needed Banner upgrades, install and deploy new applications

Scenario 4 - Some Modifications and SSO is enabled in Banner 8

Ordered steps to take:

1. Install Ellucian Solution Manager in Banner 8
2. Determine if replacing the CAS Server with EIS would simplify SSO across the organization (usually it absolutely does!) but SSO with CAS will work
3. Catalog and eliminate any un-needed Banner 8 modifications
4. Determine which 9.x applications to deploy first, ideally addressing strategic plan goals– for your first application, if you can, choose an app that you can implement vanilla
5. Determine hardware requirements for the new 9.x applications, provision them, and add them to ESM
6. Determine if any mods need to move into 9.x and plan their re-design
7. Use ESM to apply any needed Banner upgrades, install and deploy the new applications

Resources for Getting Started

XE Strategy for Banner

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Places to Find More Information

XE Guide – Log in with your Ellucian Support account

- xeguide.ellucian.com
- Get Current and Enable SSO
 - Ellucian Solution Manager (ESM)
 - Ethos Identity Information
 - SSO via CAS information
 - Banner Database Upgrades
- Plan your Upgrade
 - Hardware sizing resources
 - Application and Database server OS information
 - [Moving to XE for Banner](#) recording
- Analyze your Modifications
 - Custom Oracle forms Analyzer tool
 - Extensibility Toolset information
- Your Guide to Banner XE Adoption page
 - Available XE for Banner Applications
 - [XE Strategy for Banner Overview](#) recording



XE Guide

**XE Guide link inside
[Ellucian Hub](#)**

Places to Find More Information

eCommunities

- Banner user community
 - Global Search feature that now pulls from eCommunities, the Ellucian Support Center and the Ellucian.com website
 - White papers, webinars, documents, user posts, etc.



Download documentation directly from the Support Center

Attend an Ellucian education class

- <http://www.ellucian.com/Support-and-Training/Course-Catalog/>

Contact your Client Partner or Customer Success Manager

Optimize your Internal Resources

Are there things you're likely only going to do once as part of this upgrade?

- Potential examples: Install and configure ESM, set-up SSO into Banner 8, or move custom forms from the Banner 8 technology stack to the Banner 9 technology stack

Does it make more sense to have your staff focus on the repeatable tasks and outsource the one-time responsibilities?

- Ellucian has services to address these one-time responsibilities freeing up your internal folks to focus on your institution's repeatable priorities

Contact your Client Partner for more information

What's coming next

Product Roadmaps

High Level - www.ellucian.com/roadmaps

Detail – [Ellucian Product Calendar](#)

eCommunities

XE Guide Website

xeguide.ellucian.com

[Moving to XE for Banner recording](#)

“Our students have been very excited. It's probably a 95% approval. They love being able to see their classes in a calendar view and the ease of registration.”

- Texas Tech University, Dale Ganus,
Assistant Managing Director of
Information Systems



Summary

- 1** Banner 8 vs. Banner 9.x

- 2** Banner 8 and Banner 9.x Coexisting

- 3** Where to Start

- 4** Scenario Based Paths to Adoption

- 5** Resources for Getting Started

Thank you!

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