Ellucian Ethos Platform

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Ellucian
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Agenda

1 Why Ethos?
2 Unlock, Analyze, Act
3 Getting Started with Ethos
4 Q&A
Institution Mindset in 2017:
Four IT-related Factors Contribute to Institutional Success

<table>
<thead>
<tr>
<th>Overarching themes*</th>
<th>Key Focus Areas*</th>
<th>Example IT Initiatives</th>
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<tr>
<td>Student Success</td>
<td>Student success &amp; completion</td>
<td>Data and predictive analytics</td>
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<td>Digital transformation of learning</td>
<td><strong>Seamless, mobile-first student experience</strong></td>
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<td>Institutional Growth</td>
<td>Strategic leadership</td>
<td>Reinforcing the role of IT as a strategic pillar of the modern campus</td>
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<td>Retention of key faculty</td>
<td>Developing IT funding models for core services</td>
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<td>Higher education affordability</td>
<td>Improving data standards, governance and frameworks</td>
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<td>Sustainable funding</td>
<td>More holistic data management across platforms</td>
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<td>Constituent Experience</td>
<td>Data-informed decision making</td>
<td>Mobile-first strategies</td>
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<td>Data management and governance</td>
<td>Capitalizing on enterprise technology efficiencies and agility</td>
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<td>Data accessibility</td>
<td>Ensuring staff retention with limited budgets</td>
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<td>Operational Efficiencies</td>
<td>Information security</td>
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<td>Sustainable staffing</td>
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<td>Next-generation enterprise IT</td>
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Embracing the entire campus
UNLOCK, ANALYZE, ACT
Ellucian Ethos Data Model

Data Model

Functional Areas

- Positions
- Cash Receipts
- FA Awards
- UCAS
- Budget
- Officer
- Sections
- Refunds
- OCAS
- Recruitment
- Vendors
- Faculty
- Territories
- Invoices
- Prospective
- Students
- Chart of
- Accounts
- Encumbrances
- Grants
- UCAS
- Advancement
- Campaigns
- Door
- Contributions
- Banks
- Faculty
- Enrollment
- Campaigns
- Persons
- Faculty
- Workload
- Courses
- Faculty
- Periods
- Chart of
- Accounts
- Pay Rates
- Athletics
- Payroll
- Academic
- History
- Athletics
- Requisitions
- Athletics
- Pay Rates
- Athletics
- Functional
- Areas
The Ellucian Ethos Data Model

- **Unified Vocabulary**
  Application and platform-agnostic

- **Open Standards**
  Built on JSON and REST
  Consistent implementation across solutions

- **Reusable**
  No more point-to-point integrations

- **Single Source of Truth**
  Unified view of the student
Ellucian Ethos Integration

Ellucian Ethos Platform Partner Adoption
analyze

- a wider view
- higher education focus
- near real-time data
- role driven
- go where you are
- fast to implement
- content first
- personalize vs. modify

Responsibilities

- Chief Executive and Administrative Officer for the institution
- Partners with the Board of Trustees to oversee and ensure institutional strategy, governance, and success
- Serves as key visionary, major fund raiser; ceremonial leader; and promoter of the institution

Questions

- What is our overall count of prospective students this year compared to the last three years?
- Are there a sufficient number of prospects at this point in the recruit cycle to meet goals?
- What is the breakdown of instructional methods and overall performance?
- What is our progress to goal at this point in the recruit cycle?
- What is the trend of performance for courses with a lecture and lab as compared to lecture-only?

Funnel YTD Forecasting

Enables you to test various goal scenarios before setting your actual goals by entering goal variables on the fly and evaluating the effect on your long term goals.
**VP Finance (CFO)**

**Responsibilities**
- Strategic planning, administrative operations, financial reporting/analysis
- Develop a financial strategy, metrics tied to strategy, and ongoing development/monitoring of control systems for accurate financial data
- Ensure accuracy and integrity of all student data ensuring federal compliance

**Questions**
- What are my 5 highest categories of expense by organization or fund for the past 3 fiscal periods?
- What was my expense remaining budget for the prior fiscal year and fiscal period based upon the original and adjusted expense budget compared to actual expenses only?
- Which buildings and rooms are being used to their maximize potential?

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**VP Enrollment**

**Responsibilities**
- Provide leadership for the areas of undergraduate and graduate enrollment and financial aid
- Participate in the development of the University’s strategic plans
- Lead a seasoned team of admissions and financial aid professionals

**Questions**
- Do we have a good distribution of course sections across days and times?
- Is there a significant difference in grade distribution of students from different states?
- For each of my instructors, what is the overall grade distribution by academic term?
- What are the outcome trends by instructional method?
**Responsibilities**

- Solicit and obtain donations and grants
- Identify donor prospects
- Communication with donors / prospects
- Maintain database of donor / prospect information

**Questions**

- What is the current status of annual giving compared to our designation level goal?
- What are the trends in the demographic, biographic, and geographic characteristics of our donors over the past 5 years?
- What is the current status of annual giving compared with our campaign level goal?

**Annual Giving Progress to Distribution Goal**

Provides a monthly accumulating assessment of progress toward the distribution goal for the specified year of giving.

**Guided Experience**

- Content Rating: Average Content Rating: 4.0
- Author Rating: Average Author Rating: 5.0

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Year Over Year Comparison

Compare, filter, drill down
Compare, filter, drill down

- Processes are disjointed
- Data points are locked in shadows
- 4-walls are common
- Tools based vs. solution based
- Tightly coupled
- Closed systems
business process orchestration: a different way

- ecosystem
- agnostic
- user initiated
- content first
- event driven
- all the data
- form design
- IT friendly
Event Driven

Point and Click
Form Design

Form Design

1. Available Terms

2. Adjust Student Grade
Your business processes, your data

Ecosystem

Processes

Results

Contents for Higher Education

- Address Change Request
- Employee Leave Request
- Major Change Request
- Advisor Change
- Employee Onboarding
- Student Change Grade Process
- Course Approval Processing
- Section Registration Overload
- Department Leave Request
- Room Request Process
- Student Academic Period Profile
- Student Withdrawals
- WIFI Access Request
- IT Provisioning Process
- Student Advisor Query
- Drop Course Notification
Ellucian Ethos Identity

Access Management
- **Authentication**
  - Single Sign-On
  - Session Management
  - Password Service
  - Strong Authentication

Authorization
- **User Management**
  - User and Role Management
  - Password Management
  - Self-Service Password Management
  - Delegated Administration

Identity Management
- **User Store**
  - Enterprise Directory
  - Multiple Directory Support
  - Separate Attribute Store
  - Attribute Mapping

Ellucian Ethos Identity

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Getting Started with the Ethos Platform

Integration Use Case Patterns

- Ellucian Applications
- Ellucian Partners
- Ethos Integration
- Third Party Vendors (non-partners)
- Custom
Ethos Implementation Steps Overview

**Publisher (ERP, CRM)**
- APIs
- Events
- Permission
- Mappings

**Ethos Integration**
- Tenant
- Register applications
- Configure resources

**Consumer**
- Partner
- Ellucian Application
- Third-party Vendor Analytics Workflow

Ellucian Ethos Information

**A unifying platform purpose – built for higher education**

- **Unlock data**: Improve decision making and performance through data
- **Embrace integration**: Create a seamless experience with greater collaboration and innovation
- **Extend capabilities**: Extend rather than replace to save costs and minimize disruption
- **Enable versatility**: Choose cloud, on-premise, or hybrid model as your needs evolve

ellucian.com/ethos
Ellucian Ethos Technical Resources

resources.elluciancloud.com

Thank you!

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