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Executive Summary
Maximize Your Ellucian Enterprise Platform

University of Montana - Missoula (University of Montana) has been an Ellucian Banner client since December 1987 with the shared mission of providing superior services to students, faculty, and staff. Today Ellucian serves over 2,400 higher education clients using the Colleague, Banner or PowerCampus Enterprise (ERP) system. The Banner system purchased by University of Montana over 25 years ago included the Student and Finance systems.

Mr. Matt Riley, Chief Information Officer initially contacted Ellucian and in conjunction with Perry Brown, Provost and Michael Reid, VP for Administration and Finance at University of Montana - Missoula, ultimately engaged Ellucian to evaluate the overall use of your Ellucian solutions by institution staff and determine where opportunities exist to increase efficiencies and maximize return on investment. The primary objective in conducting the Action Planning evaluation process is to align the institution’s goals with actionable initiatives that will result in increased productivity and resource savings over time.

Key outcomes of the Action Planning process are to:

- Improve utilization and efficiencies of the Ellucian Solutions
- Explore new technologies that will enhance staff, faculty and student success
- Establish a support structure to sustain success

On 5/15/2014, University of Montana - Missoula’s Client Partner Pat Fay, conducted the on-site Action Plan discovery interviews with end-users, students, faculty and the executive sponsor team. An online survey was completed by over one hundred staff in preparation for the on-site discovery interviews. We have evaluated the information obtained from both of these engagements and present our findings along with our prioritized recommendations and a suggested timeline to maximize your Ellucian enterprise platform and meet your strategic goals, in this report.

Several high level observations from these engagements include:

- Staff is highly motivated to improve the use of Banner and become more efficient
- Most staff noted a significant lack of training in the use of the system’s basic and advanced features resulting in a heavy reliance on IT to find the answers
- Majority of processes are paper-based with minimal use of rules and communications management to automate
- Most staff interviewed were unaware of some key functionality that existed
- Reporting requests & some department process setups are centralized to IT & IR
- Shadow systems still exist
- The University has highly customized the Banner system

The Action Plan findings and recommendations represented are focused on strengthening operational excellence and improving the student experience to support the continued growth and success of University of Montana - Missoula. At Ellucian, we appreciate the opportunity to collaborate with University of Montana. We are confident that this engagement will provide a roadmap that fosters institutional effectiveness and aligns technology with institutional goals at University of Montana.
# University of Montana - Missoula’s Strategic Goals

The following are specific goals identified in your institution’s Strategic Plan that can be supported by maximizing your Ellucian enterprise education platform. Ellucian’s solutions are intended to support the achievement of these goals using the most cost effective and integrated technologies and business processes.

### University of Montana - Missoula Goals

<table>
<thead>
<tr>
<th>GOAL 1</th>
<th>Partnering for Student Success</th>
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<tbody>
<tr>
<td>Missoula’s Goals</td>
<td>Ellucian Recommendations</td>
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<tr>
<td>Provide powerful academic planning tools with real-time counseling capabilities that create new efficiencies and foster more personal interactions between advisors and students.</td>
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<td>Provide real-time advice and counsel to students, interactive “what if” scenario planning.</td>
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<th>GOAL 4</th>
<th>Dynamic Learning Environment</th>
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<tr>
<td>Missoula’s Goals</td>
<td>Ellucian Recommendations</td>
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<td>Facilitate a 360-degree view of all student activity to expedite intervention and address student issues immediately with a state of the art recruiting solution.</td>
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<tr>
<td>Build communication tracks with potential recruits to enable recruiters to address student issues immediately through an automated recruiting solution.</td>
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<tr>
<td>Enforce FERPA compliance through the use of a recruiting solution</td>
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<tr>
<td>Invest in Human Capital and by keeping your users up to date on the latest functionality and leveraging the solution to its fullest.</td>
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<tr>
<th>GOAL 5</th>
<th>Planning – Assessment Continuum</th>
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<tr>
<td>Missoula’s Goals</td>
<td>Ellucian Recommendations</td>
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<tr>
<td>Maximize the value of your investment by using experienced consultants to help keep your project(s) on track.</td>
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<tr>
<td>Pursue recommendations from industry experts for more effective or efficient ways of building operational efficiency.</td>
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<tr>
<td>Engage in activities which give University of Montana - Missoula a 360 degree view of the tasks, people, and technologies needed to perform a business process.</td>
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<td>Simplify processes and boost productivity with a document management system</td>
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<tr>
<td>Provide a process for staff members to submit expense reports that will lead to speedier reimbursement, improved policy compliance, and lessen the workload of the finance staff.</td>
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<tr>
<td>Streamline information flow with workflow management software.</td>
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<tr>
<td>Automate the processes that support how your institution works to complete important tasks more quickly and efficiently.</td>
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Current State and Positive Business Outcomes
Onsite Discovery Results

University of Montana - Missoula has been an Ellucian client since December 1987 and has achieved significant results and progress in many areas throughout the campus including Academic Records & Registration, Admissions and Student Success, Financial Aid, Planning and Budgeting, Business Services, Information Technology, Institutional Research & Assessment, Human Resources Services, Student Accounts, Student Affairs and the Executive Team, all of which participated in our onsite interviews.

Since that time, Ellucian has continued its commitment to institutions such as University of Montana - Missoula by developing powerful new functionality, capabilities and service offerings that will enhance the overall performance and efficiency of the solutions currently in place at University of Montana - Missoula.

During the onsite discoveries we heard specific business challenges described by participants across campus. This section provides additional detail about these onsite discoveries as well as Ellucian’s recommended initiatives for success in meeting them.

Our recommendations are focused on solutions that result in increased staff efficiencies and automation that will support a culture of continuous process improvement. The objective is to provide actionable initiatives that will focus your efforts on enhancements that are directly aligned with your institutional goals. These recommendations are based on years of best practice experience with hundreds of institutions such as University of Montana - Missoula in combination with the information gathered during the onsite discoveries.

Our goal is to help you capitalize on available solutions to achieve institutional excellence and student success. By addressing these challenges as part of a holistic Action Plan, University of Montana - Missoula will be better prepared to face today’s emerging trends and will be more agile to handle tomorrow’s unique challenges.

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Create a culture shift

The business of higher education has changed. Limited no longer to administrative and back office functions, the business of higher education today demands focus on a blend of domains across the campus—from teaching and learning to strategic planning.

In the face of dynamic change, your faculty and staff must learn to adapt quickly and act strategically in order to accelerate institutional effectiveness and achieve results at your institution. Unfortunately, many departments at University of Montana - Missoula have numerous long-term employees who are used to doing the same things in the same ways, and they often don’t have the time or ability to implement new capabilities and processes to increase their operational effectiveness.

Today’s higher education administrators face increasing demands to be more effective and accountable when managing their institution. It’s never been more important to build a culture of proactive leadership based on individual ownership and accountability.
Current State:

- Highly modified Banner environment. During the onsite discovery, many users indicated that they had no idea what Banner baseline looks like. Employees how had previously worked at other Banner institutions, did not recognize the University of Montana system and could not use their previous experience because of modifications. One employee referred to the highly modified University of Montana Banner system as "FrankenBanner."

- Lack of Data Governance and Process Owners to drive prioritization and configuration of Banner. Based on onsite discussions it appears that in years past a strategic decision making group regarding Banner was not strong. As a result, many of the modifications and add-ons were put in place. Although, very recently a group has been put in place, more work may need to be done in setting priorities and governance.

- Both the online survey and the onsite meetings indicated that staff feels that training is not sufficient or non-existent. Seventy-six percent of those surveyed indicated that they had not received any training in the past two years.

- Onsite interviews indicated that generally when new processes are needed or there is a problem, that the staff just figure it out on their own by “tweaking” Banner in ways that they are not sure are appropriate to accommodate entrenched business practices.

Recommendations:

- Ellucian recommends that University of Montana partner with Ellucian to do Business process modeling to get “back to baseline” or at least closer to it. This engagement needs to have executive sponsorship to make recommendations happen; i.e. policy changes, prioritization, etc. University of Montana employees need to see what baseline Banner does to understand if it will meet UM needs.

- Use Business Process Modeling consulting to identify Best Practices and processes across all business units to determine the future state of key processes. This would also include a review of all existing customizations at University of Montana.

- Use Ellucian Management Consulting services to review and recommend governance processes surrounding Banner and related systems to assist with formalizing strong governance to optimize the use of Banner.

- Improve training options by engaging Ellucian Education services to take the burden of delivering training off University of Montana. Purchasing the On-Demand Subscription Library will provide self-paced online training segments for your functional users. Both online and classroom training are available on special topics for larger groups.

Future State:

By engaging with institutional stakeholders and leadership, Ellucian process experts can help you identify “future state” business processes that support your strategic goals and then deliver the tools you will need to support those business processes with agility and efficiency. We deliver a clear set of initiatives, action items, and requirements to help you achieve your future state model.
Increase Efficiencies and Improve Automation

Today’s budget challenges have all institutions looking to “do more with less.” Your mandate is to offer more and better services to students and staff, while at the same time reducing your institution’s costs.

It’s never been more imperative to automate the entire student lifecycle—from when a student is first recruited by an institution to relationship management after a student graduates.

During our onsite assessment it became apparent that many departments at University of Montana - Missoula are not taking full advantage of existing Banner functionality and automation features and instead are relying on manual, paper-based and batch processing efforts to accomplish critical tasks.

Current State:

- 68 of 99 respondents indicated low or no utilization of the system for automated email communications
- 74% of survey respondent indicated lack of agreement that the University has updated and accurate business process documentation
- Online survey responses: “We use many paper-based processes that are incredibly archaic and confusing for students (e.g. various course override forms and procedures). These processes need to be replaced with more modern-day, automated, smart-logic-driven processes that would make the student experience easier and more enjoyable.”
- Application for degree, grade changes, change of major, advising forms, and several other academic record updates are all manual process driven by paper forms.

Recommendations:

- Ellucian recommends that University of Montana implement Banner Workflow with assistance from Ellucian to develop initial workflows and provide training and knowledge transfer.
- Ellucian recommends purchasing Banner Document Management Suite (BDM) an integrated document imaging software to assist University of Montana in moving away from tedious paper documents to electronic documents.

Future State:

By enhancing the use of existing solutions you can leverage numerous automation features to cut down on your staff’s cumbersome (and often error-prone) manual processes. Automation provides a more repeatable, reliable, and efficient means for things such as communicating with your students and printing reports, schedules or bills that are needed on a regular basis. University of Montana stakeholders will work with Ellucian experts to identify key processes to be modeled to gain efficiencies, eliminate duplicated efforts, and define “future state” business processes to best support institutional policies and strategic initiatives.

Banner Workflow spans the entire organization and is completely Web based to provide ultimate flexibility in process management. The solution is currently owned by University of Montana, but has never been implemented. The solution offers seamless integration with Banner and other Ellucian solutions to increase the usability and value across the University enterprise. Implementation and utilization of Banner Workflow will offer improved constituent service, expedited task completion, and consistency of process completion for the University.

Hard copies of documents and manual processes mean cumbersome workflows and slow response times. Banner Document Management Suite lets your process any document or file in less time without adding additional staff.
An aggressive and targeted plan with services to help you optimize your investment in Ellucian technology, streamline your campus-wide workflow, and automate your strategic business processes will enable everyone on your staff to reduce the total cost of ownership of your technology and offer better service to students.

**Expand/Improve Self-Service**

As the generational and cultural shift moves toward 24/7 self-service offerings, it is increasingly important to offer high-quality self-service tools for your students, staff and faculty. To enhance operational excellence, University of Montana - Missoula must deliver online access to virtually any information your constituents need at any time of the day or night.

Ellucian’s online self-service solutions empower your institution to offer a full spectrum of online services through innovative business workflows and sophisticated forms. During the evaluation process, however, we identified that many of these tools are either not fully providing the intended impact or have not been implemented at all.

**Current State:**

- Departmental Budget Managers cannot pull their own budget reports and have to depend on others to create them because SS Budget Query is not being utilized
- Staff fully recognizes the need for EPAF and the operational efficiencies utilization would provide, but simply cannot dedicate resources to accomplish the configuration.
- Staff needs a better way to get to information that should be available in Banner Self-Service from managing time entry to electing benefits.

**Recommendations:**

- Ellucian recommends that University of Montana – Missoula improve use of Self-Service by implementing Finance Self-Service (FSS) Budget Queries, Web-Time Entry, Employee Benefits Administration, and Electronic Personnel Action Forms (EPAFs).
- Ellucian recommends a review of University of Montana’s existing self-service to assist with the optimization of Banner Self-Service and further efforts to eliminate the current high degree of customization.

**Future State:**

When you deliver reliable self-service solutions, students, staff and faculty no longer need to wait for assistance and satisfaction will be significantly improved at University of Montana - Missoula.

Capitalizing on self-service solutions is also an effective way to decrease demands on your administrative staff by reducing the number of calls and visits for routine requests. This enables staff to focus on individual students and more strategic initiatives that will increase institutional efficiency and student success.
Improve Strategic Enrollment Management

Improve Strategic Enrollment Management

Competition is getting tighter than ever before. As a result, University of Montana - Missoula has an urgent need for top-notch recruitment and retention strategies to identify, attract, and enroll best-fit students with targeted enrollment marketing programs and help students’ progress successfully through their programs.

In a time of limited budgets, reduced staff resources, increased competition, and changing student demands, it’s never been more important to leverage all the power and capabilities of Ellucian’s advanced enrollment solutions and academic advising and degree audit to achieve these critical goals.

Toward that end, it is imperative that your admissions and enrollment team have the tools and information they need to focus on connecting with your institution’s target prospects in the right way, at the right time and help them be successful once enrolled. Ultimately, it’s about getting those best-fit prospects to apply and enroll and complete on time.

At the same time, your team needs to know more about campaign performance, so they can focus their energy on the most effective recruitment strategies and advisors counsel students more successfully.

Current State:

- From the onsite meeting, we noted that while University of Montana has been working for the last 8-9 months of restructuring all of their Undergraduate degrees in preparation for a Degree Audit system, there is no comprehensive integrated system for academic advising, degree audit, and transfer articulation.
- During the onsite meetings we also heard that Academic Planner (a home grown system) had issues with accurate data, was not real time information, and was extremely time consuming for IT to maintain.
- Currently are not meeting Federal Requirements and are at risk by the Department of Education for a negative review because of the lack of a Degree Audit system.
- Currently using Hobsons for Admissions and Recruiting that requires several manual interfaces. The Banner integration has issues and results in interfaces that require manual intervention and are very time consuming.

Recommendations:

- Ellucian recommends that University of Montana purchase and implement Ellucian Degree Works to help students and their advisor negotiate your institution’s curriculum requirements, eliminate homegrown Academic Planner system, and most importantly meet Federal and Department of Education requirements. With a new emphasis on completion rates and time to degree, finding better ways to support your students’ academic plans is more important than ever. With Degree Works your institution can provide real-time advice and counsel to students, interactive “what if” scenario planning both of which lead to more timely degree certification and better retention and improved transfer recruitment.
- Ellucian recommends that University of Montana Investigate purchasing Ellucian Recruiter prior to Hobson’s contract expiration to assist with automation of the enrollment lifecycle and integration with Banner.

Future State:

In today’s competitive market, your institution needs to find the right students—and the right mix of students—to meet critical targets for enrollment. That means your University of Montana - Missoula needs to be more sophisticated and focused in communicating with potential students—and more
effective in managing the entire admissions process. When you have the tools you need to automate the recruiting lifecycle and make strategic decisions, you can focus recruitment efforts on activities that drive results and maximize your enrollment goals.

Once your students are enrolled and start their programs, you want to ensure that your students’ progress successfully through the institution. Robust academic planning tools and real-time counseling capabilities help advisors provide consistent and meaningful direction to students. Your students receive the academic advice they need to succeed.

Optimize Existing Technology and Adopt Emerging Solutions

University of Montana - Missoula and Ellucian have been partners for 25 years. During that time Ellucian has continued its commitment to providing expanded capabilities and campus-wide solutions which will better serve your institution. At the same time natural events such as staff turnover, growing competition within higher education, and expectations for more analytical reporting created the need for University of Montana - Missoula to leverage more efficient and effective ways to use existing and emerging Ellucian solutions.

Our campus-wide evaluation determined that most departments are using the Banner system as it was originally implemented years ago, significant customizations have been implemented ignoring existing Banner baseline functionality, while effort has been focused on shadow system development and manual work arounds rather than to extending Banner to include new functionality or areas of the system that were not fully configured during the original implementation. As a result, several departments around campus are not currently taking full advantage of baseline capabilities and inherent system-wide integration.

Our approach for University of Montana - Missoula is prescriptive, with a commitment of focusing on current industry best practices and regulatory compliance.

Current State:

Several Areas have been identified where University of Montana is not currently taking full advantage of Banner’s baseline capabilities and system wide integration.

- Faculty Load & Compensation (FLAC)
- Electronic Personnel Action Forms (EPAF)
- eTranscripts
- Time & Effort Reporting
- Return of Title IV (R2T4)
- Algorithmic Budgeting
- Web Time Entry
- Reserve Seating with Waitlisting
- Withdrawn Students and Registration Statuses
- Incomplete Grading
- Bill Presentation – Statements and Registration
- Registration Status
- Online Requisitioning and Purchasing

Recommendations:

- Ellucian recommends that University of Montana - Missoula utilize Ellucian Application Consulting Services for the above areas to optimize use of Banner’s baseline functionality.
Utilization of this functionality will reduce time and effort for staff, reduce manual processing, reduce errors, and standardize process.

- University of Montana – Missoula engage the Ellucian account team to conduct a services framework assessment to determine the level of support needed to successfully execute the XE vision at the University. This assessment will include recommendations for education, technical training, timing, and implementation of extended functionality.

**Future State:**

Our recommendations are focused on taking actions that will result in increased efficiencies and process automation that support a culture of continuous process improvement. By discovering new efficiencies, eliminating inefficiencies, and aligning appropriately supported business processes with strategic initiatives, your institution can more successfully focus its resources on achieving desired goals.

The Ellucian Extensible Ecosystem, or XE, is a technology strategy to protect your investments and help you expand or adopt solutions as priorities shift. The vision behind Ellucian XE is simple. Institutions should be able to extend, configure, and add technologies as campus needs evolve—and do so without sacrificing existing investments.

Ellucian XE makes it easier and more efficient for institutions to implement, manage, and extend our solutions. This innovative strategy supports:

- improved functionality
- better integration
- more agile development
- expanded points of access for users
- innovative delivery methods

The Ellucian Extensible Ecosystem, or XE, is a technology strategy to protect your investments and help you expand or adopt solutions as priorities shift.

**Strategically Manage Technology**

Creating a strong support structure and a culture of continuous learning will help University of Montana achieve and sustain long-term success with its Ellucian solutions. Our evaluation of University of Montana's current technology infrastructure has uncovered several opportunities for strengthening processes and culture to achieve maximum results over the long term.

**Current State:**

- Keeping your mission-critical applications at peak performance demands diligence and specialized expertise. Day-to-day management of applications and their associated operating systems and database environments can be challenging for institutions whose resources are taxed by a variety of often-competing IT priorities. Our assessment indicates University of Montana is struggling in this area. Daily administration of key enterprise applications often reduces the time IT resources can dedicate to other strategic priorities.

**Recommendations:**

- Ellucian recommends University of Montana assess the advantages of contracting for Ellucian Application Management Services to take on the daily administration of key enterprise applications, so you can focus your IT resources on other strategic priorities.
- Ellucian recommends that University of Montana – Missoula assess the opportunities afforded by contracting for Ellucian Application Hosting Services. This should be accomplished prior to
the next scheduled hardware refresh to determine how reallocation of those funds toward this endeavor can achieve longer-term cost savings.

**Future State:**

A strong support infrastructure will minimize the risk of project failure and allow for continuous collaboration and information sharing.

University of Montana will achieve the following:

- Relieve staff from daily management headaches
- Redirect resources to more strategic priorities
- Reduce total cost of ownership
- Maximize performance and availability
- Create a more nimble, strategically oriented IT organization

The predictability of a fixed price with the flexibility of remote, onsite, and hosted service delivery options combined with an increased level of customer service in an environment where IT staff is afforded time to focus on the details, creates an increased return on investment in tangible and less tangible outcomes. Every application management engagement is backed by a team of application experts, while a single point of contact ensures best-in-class issues management.
Let’s Get Started
Next Steps

With the move toward expanded offerings and enrollment growth, the time to evaluate and improve business processes has never been more critical.

Ellucian believes that executing the Action Plan presented to University of Montana - Missoula will result in substantial staff productivity gains and an enhanced and more personalized user experience for students and staff.

Next steps to begin driving results are:

STEP 1 PRIORITIZE ELLUCIAN RECOMMENDATIONS
STEP 2 EXECUTIVE TEAM APPROVAL
STEP 3 DEVELOP PROJECT PLAN
STEP 4 ALLOCATE RESOURCES

We welcome the opportunity to partner with University of Montana - Missoula in defining and achieving best-in-class models of operational excellence and student success.

Let's get started.
Based on the Ellucian findings of the University of Montana engagements, Ellucian recommends the following optimization timeline to support these projects. This timeline is a living, breathing document, and the project manager will work closely with all key stakeholders and leadership to adjust as necessary to ensure institutional success. The following is a recommendation but can be adjusted and aligned to University of Montana’s goals and internal needs.

<table>
<thead>
<tr>
<th>Optimization and Automation</th>
<th>Phase 1</th>
<th>Phase 2</th>
<th>Phase 3</th>
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<tbody>
<tr>
<td><strong>Create a Culture Shift</strong></td>
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<tr>
<td>Business Process Modeling - Back to Baseline</td>
<td>X</td>
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<tr>
<td>Management Consulting - Governance and Prioritization</td>
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<tr>
<td>Ellucian Education Services - Subscription Library</td>
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<tr>
<td>Ellucian Education Services - Online Training &amp; Classroom Training</td>
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<tr>
<td><strong>Increase Efficiencies and Improve Automation</strong></td>
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<td>Banner Workflow</td>
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<td>Banner Document Management</td>
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<td><strong>Expand/Improve Self-Service</strong></td>
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<td><strong>Optimize Existing Technology and Adopt Emerging Solutions</strong></td>
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<td>Application Consulting Banner Optimization</td>
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<td><strong>Strategically Manage Technology</strong></td>
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<td>Application Management Services (AMS)</td>
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<td><strong>Modernization of Banner Solution</strong></td>
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<td>Ellucian Degree Works</td>
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<tr>
<td>Ellucian Recruiter*</td>
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* AHS suggested timeline is during a hardware refresh cycle
* Recruiter suggested timeline is aligned to the contract expiration of Hobson’s
## Solution Descriptions

Our evaluations during the Action Planning process at University of Montana have uncovered several opportunities where investment in new solutions can deliver significant return on investment over the course of this multi-year Action Plan. Descriptions of the most strategic recommended solutions have been provided below. Please contact your Client Partner, Pat Fay, for additional information.

<table>
<thead>
<tr>
<th>Solution</th>
<th>Benefits</th>
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| **Banner Document Management Suite** | The Banner Document Management Suite eliminates many tedious manual tasks. For example, when a user scans new student information—such as a letter of recommendation—the system updates the student’s admissions checklist. The Banner Document Management Suite makes it easy to:  
  - Capture and organize electronic documents  
  - Link documents to information in Banner  
  - Distribute documents in client/server and web-based environments  
  - Scale to meet long-term, institution-wide document management needs  
  - Manage documents externally to Banner without requiring programming or complicated configuration |
| **Banner Travel & Expense Management** | Designed from the ground up for higher education and its unique processes Banner Travel and Expense Management reduces the cost of processing expense reimbursements and improves the speed and accuracy of authorizing and paying business travel. This travel and expense management solution helps you establish appropriate policies, encumber travel funds, authorize expenditures, process reimbursements, electronically store supporting attachments and manage approvals—all from a single, process-directed web interface. |
| **Ellucian Degree Works**        | Ellucian Degree Works provides a comprehensive set of web-based academic advising, degree audit, and transfer articulation tools to help students and their advisors negotiate your institution’s curriculum requirements. Robust academic planning tools and real-time counseling capabilities help advisors provide consistent and meaningful direction to students. Transfer articulation support helps staff and students determine how coursework from other institutions is assessed and applied at yours. Your students receive the academic advice they need to succeed and your advisors gain new capabilities to help them counsel their students more successfully. |
Recruiter is a powerful student recruitment solution that will take University of Montana - Missoula’s enrollment management process to the next level. Recruiter automates the enrollment lifecycle so you can do more with limited resources and budget. Best of all, you can cost-effectively focus your recruitment efforts on activities that drive results and maximize your enrollment goals.

At Ellucian, we offer the implementation services your institution needs to help build a solid digital framework and get the absolute most out of your technology investments. Thanks to our proven methodology, our team of consultants works with you to determine an implementation plan that keeps your campus online throughout the entire implementation process. And because of our extensive experience working with institutions of higher education like yours, we’re adept at delivering on time—and on budget—implementations that maximize the value of your investment.

**Project Management**

To make sure your projects are strategically implemented, on time, and on budget, Ellucian developed a formal process to manage your project through its full life cycle.

**Ellucian Delivery Methodology**

Our unique methodology, developed specifically for higher education, is based on a collection of best practices and Project Management Institute (PMI) standards. This methodology is used by our delivery teams to implement all of our customers’ projects, whether large full-scale ERP systems or specific project components. It allows us to establish clearly defined controls and project deliverables to ensure that deadlines are met, budgets are adhered to, and quality is preserved.

This approach enables you to maintain management oversight of critical, enterprise-wide projects, while we help you conduct the best possible implementation.

**Program Management Office**

To ensure that our processes and standards always stay in check—and so our customers’ implementations stay consistent and on target—we run our project management and delivery services through a program management office that defines and maintains policies and standards. That way, our project managers have the controls they need to assure our partner institutions experience a thoroughly effective implementation.
BUSINESS PROCESS MODELING

This activity is core to our Revitalization Services program. Our consultants work with key players across your institution to review and define business process models, including the departments and individuals involved at each point in the process. At the same time, we identify and document what technologies are being used (or are not being used) to support each step in the process.

On-site sessions are delivered by Ellucian consultants working with institutional personnel to determine the future state of the key processes. Together, we:

- Define the process
- Identify inefficiencies
- State the process goals and align the process to the strategic goals of the institution
- Identify the people and technology critical to the success of the process
- Identify initiatives, actions, and steps to achieve the future state

ELLUCIAN EDUCATION SERVICES

Technology offers great potential to decrease workloads and increase productivity – but only if functional users are leveraging its full capabilities. Today with tight budgets and multi-tasking employees, finding the time and resources to keep your workforce at peak skill levels isn’t always easy.

Ellucian Education Services takes the burden of delivering training off your institution, and it provides flexible training options that can be tailored to meet your users’ individual needs and timelines, cost effectively. And who knows better how to maximize every ounce of functionality in your solutions than the company who made them?

Our comprehensive Education Services range from basic to advanced courses for technical, functional, and managerial personnel.

Our experts have many years of experience in delivering hands-on, best-in-class training to users at higher education institutions. They are dedicated to providing you with ongoing learning opportunities and specialized offerings.

We offer three training options:

- **On-Demand Subscription Library** provides short training segments so functional users can quickly master the software they use to do their jobs, without leaving their desks - which means more time for them to dedicate to student success and the mission of your institution. This training option is self-paced and accessible anytime so users can participate according to their individual needs and timelines. Many courses include an assessment of proficiency at the end.
- **Online Training** provides the conveniences of course access
from the user’s desktop with the advantages of instructor guidance and peer collaboration.

- **Classroom Training** provides hands-on education in an interactive classroom setting at a regional location or at your campus. Classroom training also is available in the form of pre-conferences to larger user group meetings along with special Ellucian education conferences.

- **Training Credits** are a purchasing option that enables you to budget a certain amount to use throughout the year for any combination of online or classroom training channels.

Ellucian Management Consulting provides your institution with structured, comprehensive access to our resources and expertise. We offer dedicated on-site leadership, flexible remote services, and access to specialists with expertise in key higher education technologies. By working with our partner institutions in this way, we can help eliminate obstacles, control non-discretionary spending, and use resources in the most strategic way possible to fulfill institutional priorities.

**Planning**
Fundamentally, our consultants work with our partner institutions to plan out every aspect of implementation and set expectations with key stakeholders along the way, for full buy-in and to ensure there are as few surprises along the way as possible.

**Transforming**
We also work to ensure that our partner institutions achieve the operational efficiencies that can transform how they do business; assuring that their investments have all the desired impacts they’re seeking.

**Performing**
To make sure each institution gets the most out of their technology investment, we provide service-level agreements, capture and reporting of metrics, improvement plans, and escalation processes, ensuring consistent and predictable performance.

**Emerging**
Of course, our engagement doesn’t stop with implementation and fine-tuning. At Ellucian, we also offer a forward looking approach to consulting where we analyze trends in higher education and help institutions map to the future.

**Enterprise**
No matter what technologies your institution puts into place, we make sure they can scale to fit your needs—no matter how large your institution is.
Advisory Services

Ellucian also offers extensive advisory services to help manage every aspect of your technology investment, providing needed breadth and depth of skill, and giving your institution a chance to fully leverage our experience with customers and institutions from across higher education.

Banner Workflow

Banner Workflow is open, flexible workflow management software that automates, simplifies, and directs the flow of information across your entire institution. Business events—a new hire or a student applying for admission, for example—triggers the appropriate business process logic, rules, and conditions. Activities that once required manual triggers—notifications, approvals, and other processes—happen automatically, speeding completion of tasks while ensuring consistency and accuracy. The results are more efficient operations, better customer service, and better information in the hands of the people who need it.