UNIVERSITY OF NORTH CAROLINA
A SYSTEM OF HIGHER LEARNING

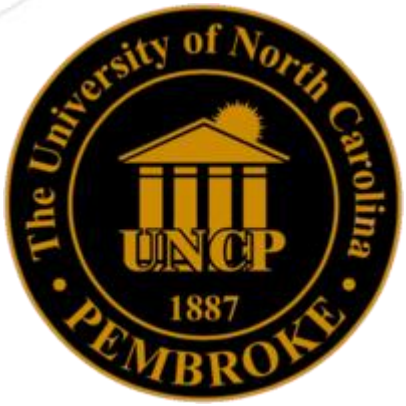
Banner 9

(formerly known as XE)

Roundtable

UNIVERSITY OF NORTH CAROLINA
A SYSTEM OF HIGHER LEARNING

System & Procedures Consortium

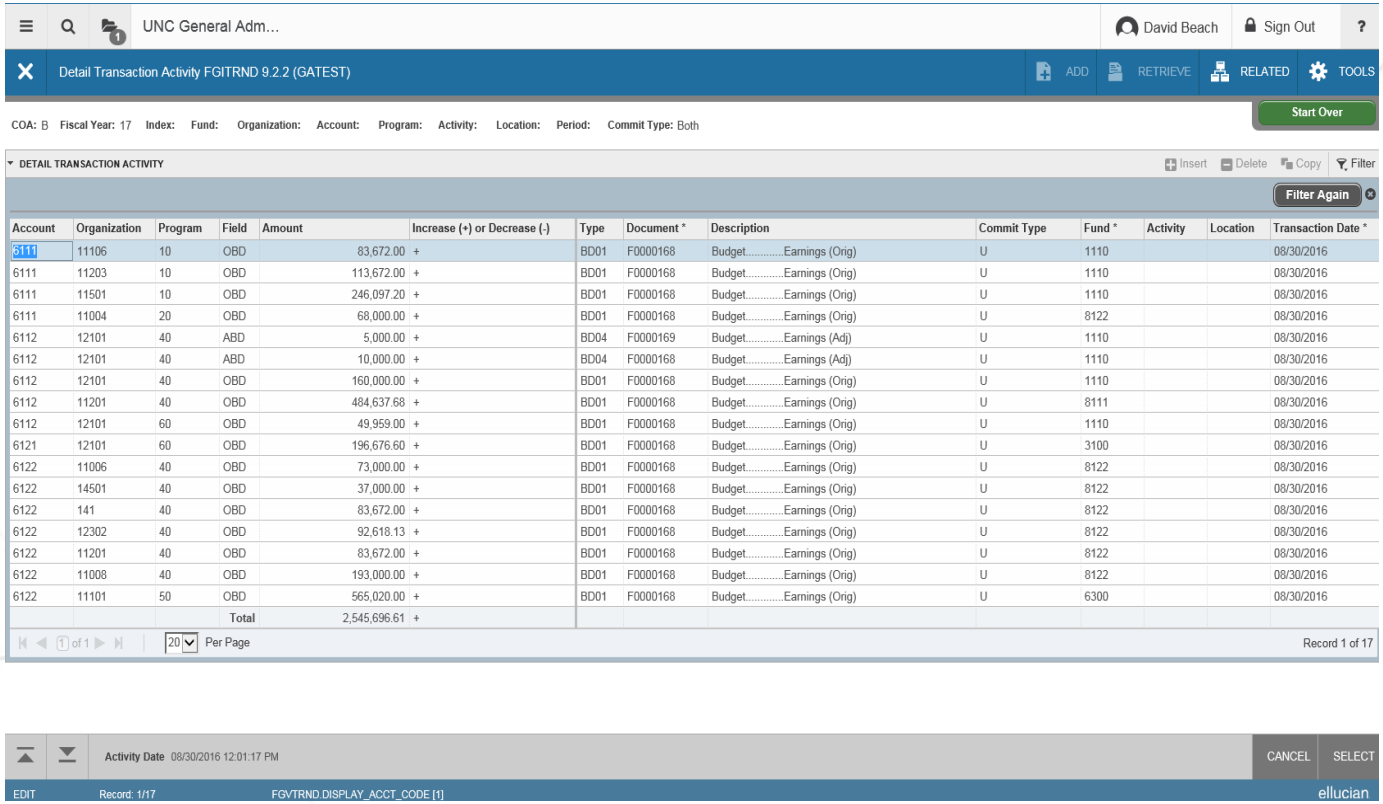


Banner 9

- Transforming INB to Banner Admin 9.x
- Self-Service “XE” Applications

Starting This Year

- Transforming INB to Banner Admin 9.x



UNIVERSITY OF NORTH CAROLINA
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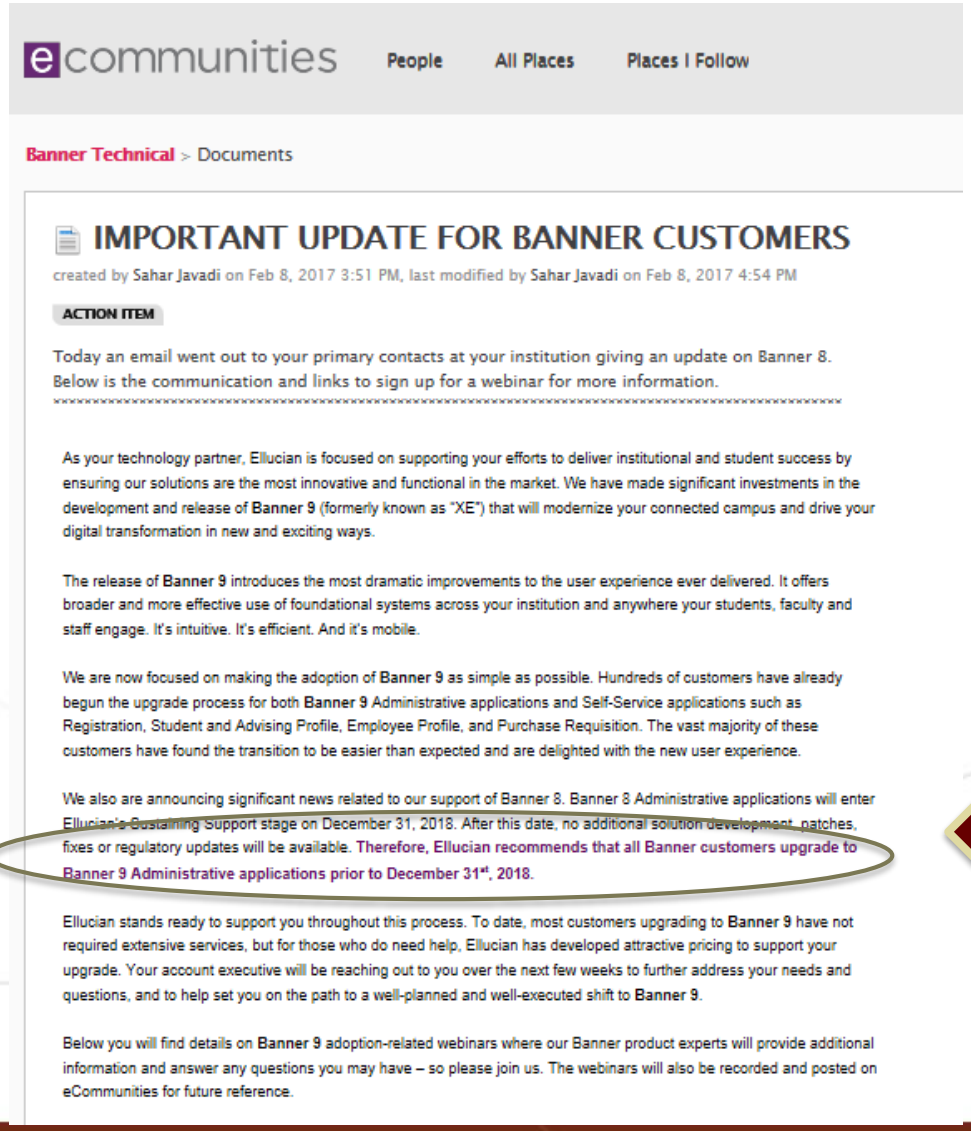
The BANNER 8.x Announcement



ecommunities People All Places Places I Follow

Banner Technical > Documents

IMPORTANT UPDATE FOR BANNER CUSTOMERS

created by Sahar Javadi on Feb 8, 2017 3:51 PM, last modified by Sahar Javadi on Feb 8, 2017 4:54 PM

ACTION ITEM

Today an email went out to your primary contacts at your institution giving an update on Banner 8. Below is the communication and links to sign up for a webinar for more information.

As your technology partner, Ellucian is focused on supporting your efforts to deliver institutional and student success by ensuring our solutions are the most innovative and functional in the market. We have made significant investments in the development and release of **Banner 9** (formerly known as "XE") that will modernize your connected campus and drive your digital transformation in new and exciting ways.

The release of **Banner 9** introduces the most dramatic improvements to the user experience ever delivered. It offers broader and more effective use of foundational systems across your institution and anywhere your students, faculty and staff engage. It's intuitive. It's efficient. And it's mobile.

We are now focused on making the adoption of **Banner 9** as simple as possible. Hundreds of customers have already begun the upgrade process for both **Banner 9** Administrative applications and Self-Service applications such as Registration, Student and Advising Profile, Employee Profile, and Purchase Requisition. The vast majority of these customers have found the transition to be easier than expected and are delighted with the new user experience.

We also are announcing significant news related to our support of Banner 8. Banner 8 Administrative applications will enter Ellucian's Sustaining Support stage on December 31, 2018. After this date, no additional solution development, patches, fixes or regulatory updates will be available. **Therefore, Ellucian recommends that all Banner customers upgrade to Banner 9 Administrative applications prior to December 31st, 2018.**

Ellucian stands ready to support you throughout this process. To date, most customers upgrading to **Banner 9** have not required extensive services, but for those who do need help, Ellucian has developed attractive pricing to support your upgrade. Your account executive will be reaching out to you over the next few weeks to further address your needs and questions, and to help set you on the path to a well-planned and well-executed shift to **Banner 9**.

Below you will find details on **Banner 9** adoption-related webinars where our Banner product experts will provide additional information and answer any questions you may have – so please join us. The webinars will also be recorded and posted on eCommunities for future reference.

Be transformed by Dec. 31, 2018

"Bannerisms" we will need to stop using…

INB

XE

SSB

… and replace with new terminology.

Administrative Applications

Banner 9

Self-Service Applications

UNIVERSITY OF NORTH CAROLINA
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Responses to my e-mail

Fri 3/3/2017 11:45 AM

David P. Beach

2017 UNC System Finance Conference: XE Roundtable Session

To 'coffeycg1@appstate.edu'; 'cornellla@appstate.edu'; 'Jamestd1@appstate.edu'; 'jamisondt@appstate.edu'; 'mainkt@appstate.edu'; 'reesejp@appstate.edu'; 'robertsaj@appstate.edu'; 'taylorld1@appstate.edu'; 'andrewsc@ecu.edu'; 'bolamk@ecu.edu'; 'farrowk@ecu.edu'; 'peeblesp@ecu.edu'; 'smithtra14@ecu.edu'; 'wilsona@ecu.edu'; 'pastoddard@ecsu.edu'; 'crwhidbee@ecsu.edu'; 'callen@uncfsu.edu'; 'kaube@uncfsu.edu'; 'sallen4@uncfsu.edu'; 'acheath1@uncfsu.edu'; 'espears@uncfsu.edu'; 'cstrick6@uncfsu.edu'; 'kscaster@ncat.edu'; 'sburwell@ncat.edu'; 'chrispc@ncat.edu'; 'jghardin@ncat.edu';

Good Afternoon,

Downtown Winston-Salem is an exciting venue and, in just 10 days, we will all be gathering there for this year's conference. Wow, how time flies!

You have signed up for **the XE ROUNDTABLE** session and I will be your facilitator. To help put some structure around the discussion, I thought I might start out with a quick update of what we have been doing at UNC-GA to prepare and then allow each campus to share their ideas with the group.

Discussion around this topic can go in many directions – both technical and functional – and we look to have a balanced audience with varied interests. If you have any specific questions that you would like to have addressed while we are together, please send them to me and I'll do my best to get them organized and answered during the roundtable. I want to make this an informative session – one that allows everyone to get something from it.

See you in Winston-Salem!

David Beach
ERP Systems Consulting
University of North Carolina General Administration
910 Raleigh Road
Chapel Hill, NC 27515
dpbeach@northcarolina.edu
919-843-9168

COMMENT 1

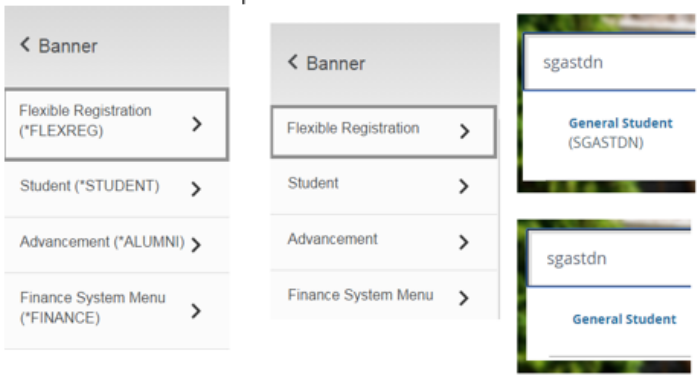
The overall conversion plans from GA would be helpful.

- Monthly Meeting with Ellucian
- Preparing the Hosted environment
- Testing UNC Mods by Ellucian
- Payroll Interfaces
- Custom forms
- NCAS Jobs

Monthly Meetings with Ellucian

THIS MONTH'S QUESTIONS

- IntelliJ vs Eclipse for Banner 9 Self-Service development (Grails)? Are there any issues with using Eclipse?
- Application Navigator menu - what all controls how this is built? Particularly some users can see the form names in the search bar others cannot. Example on left can see



- Defect in AppNav 2.0.1 invalid username/password error related to self-service user. Any ideas on timeline of when this will be fixed?
  - What about other small issues/defects in BannerAdmin. What is Ellucian seeing in terms of bugs/defects reported and user interface enhancement requests?
- Banner Admin extensions - is it possible to build an extension on top of an extension or better to add to the original extension and rebuild/deploy?

- Highly Technical
- To Prepare the Environment
- Single Sign On
- Application Navigator
- Hardware & SysAdmin needs
- Database Requirements
- Developer discussion

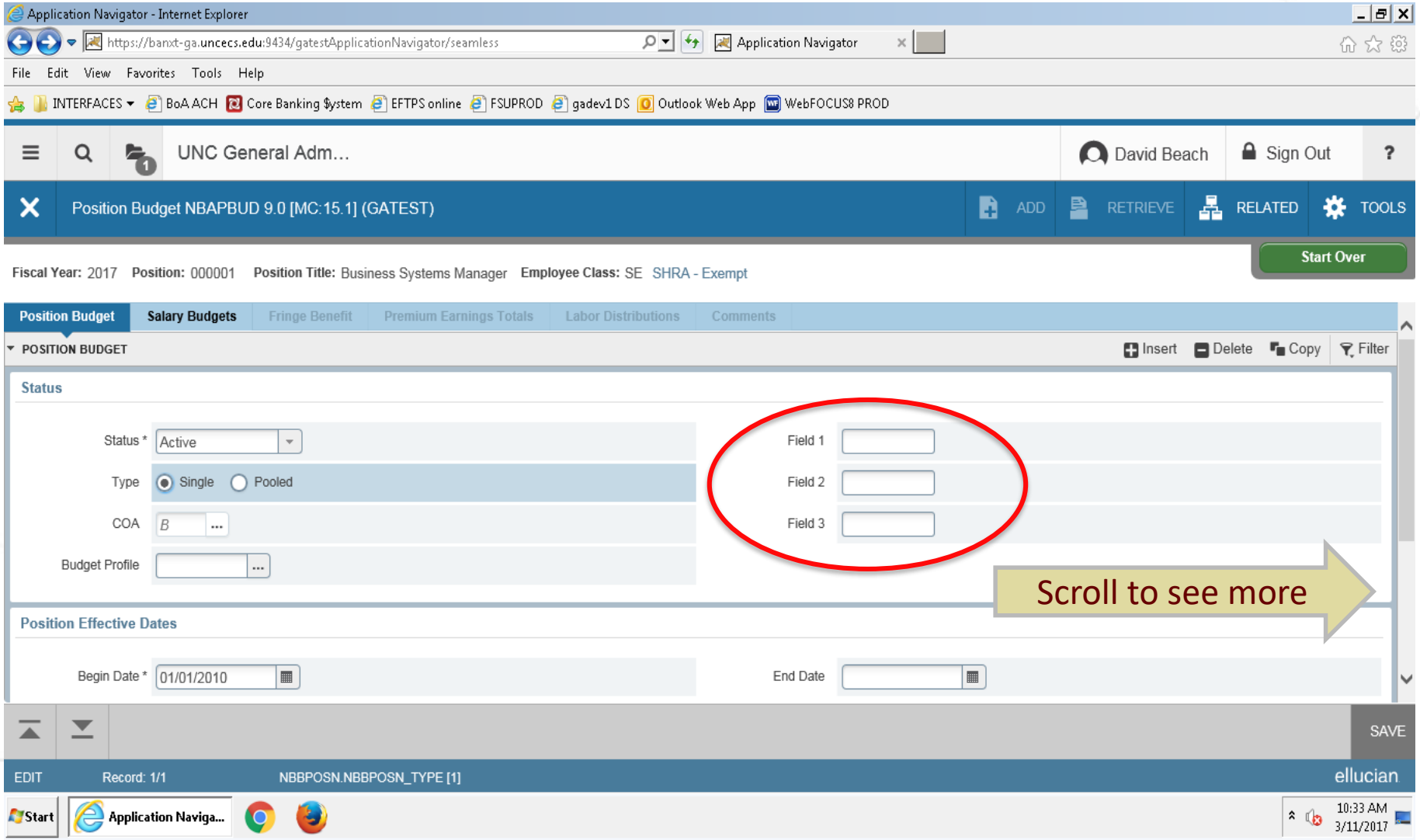
- Now includes campus IT

UNC-GA Customizations by Ellucian

READY NOW

- UNC 001 – Position Control Budgeting

- Let's look at transformed NBAPBUD
- Illustrates some Banner 9 navigation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UNC General Adm...
David Beach
Sign Out
Position Budget NBAPBUD 9.0 [MC:15.1] (GATEST)
ADD
RETRIEVE
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TOOLS
Start Over
Fiscal Year: 2017 Position: 000001 Position Title: Business Systems Manager Employee Class: SE SHRA - Exempt
Position Budget
Salary Budgets
Fringe Benefit
Premium Earnings Totals
Labor Distributions
Comments
POSITION BUDGET
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Field 1
Field 2
Field 3
Scroll to see more
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End Date
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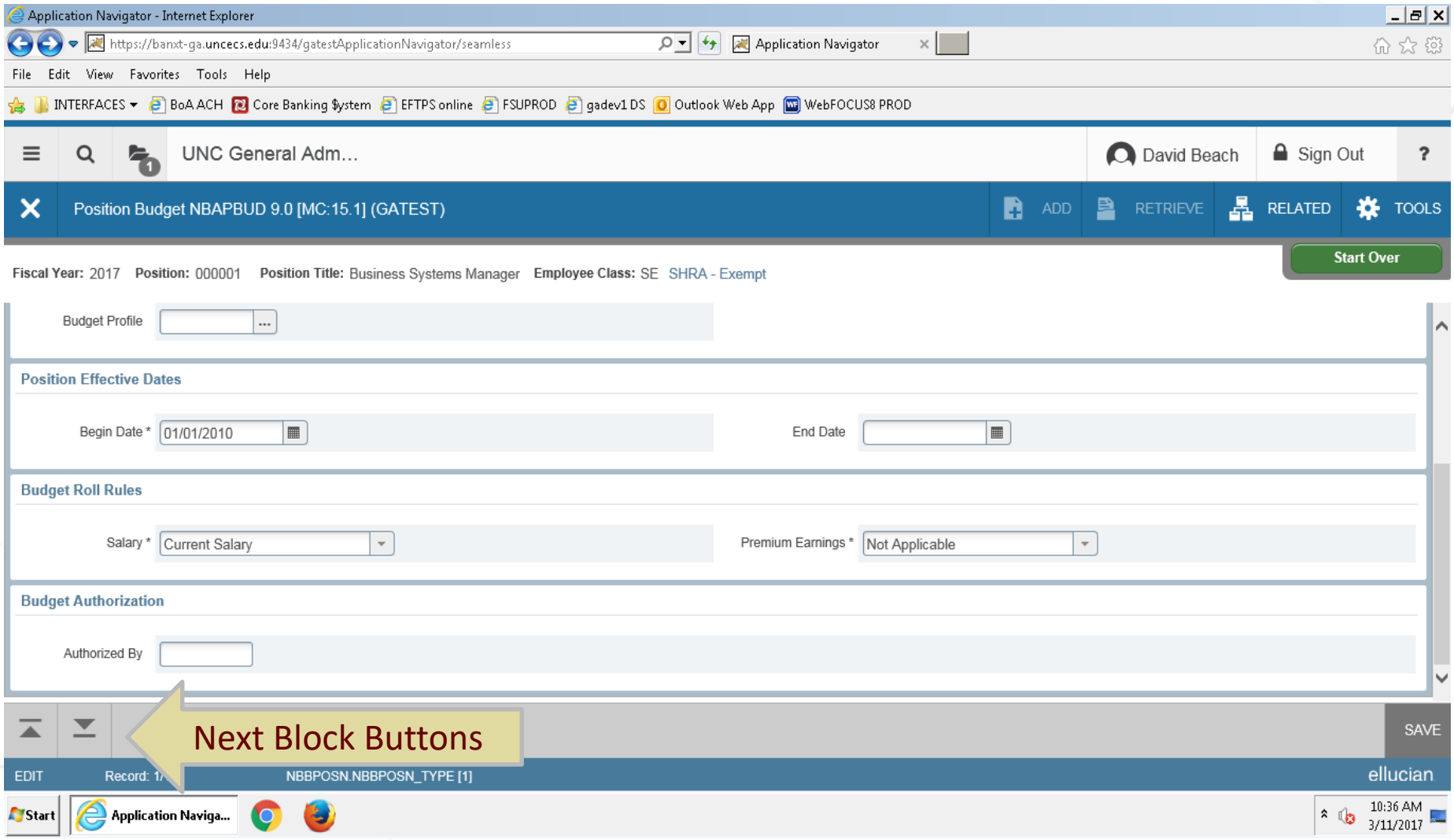
3/11/2017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David Beach
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Budget Profile
Position Effective Dates
Begin Date * 01/01/2010
End Date
Budget Roll Rules
Salary * Current Salary
Premium Earnings * Not Applicable
Budget Authorization
Authorized By
Next Block Buttons
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Record: 1/
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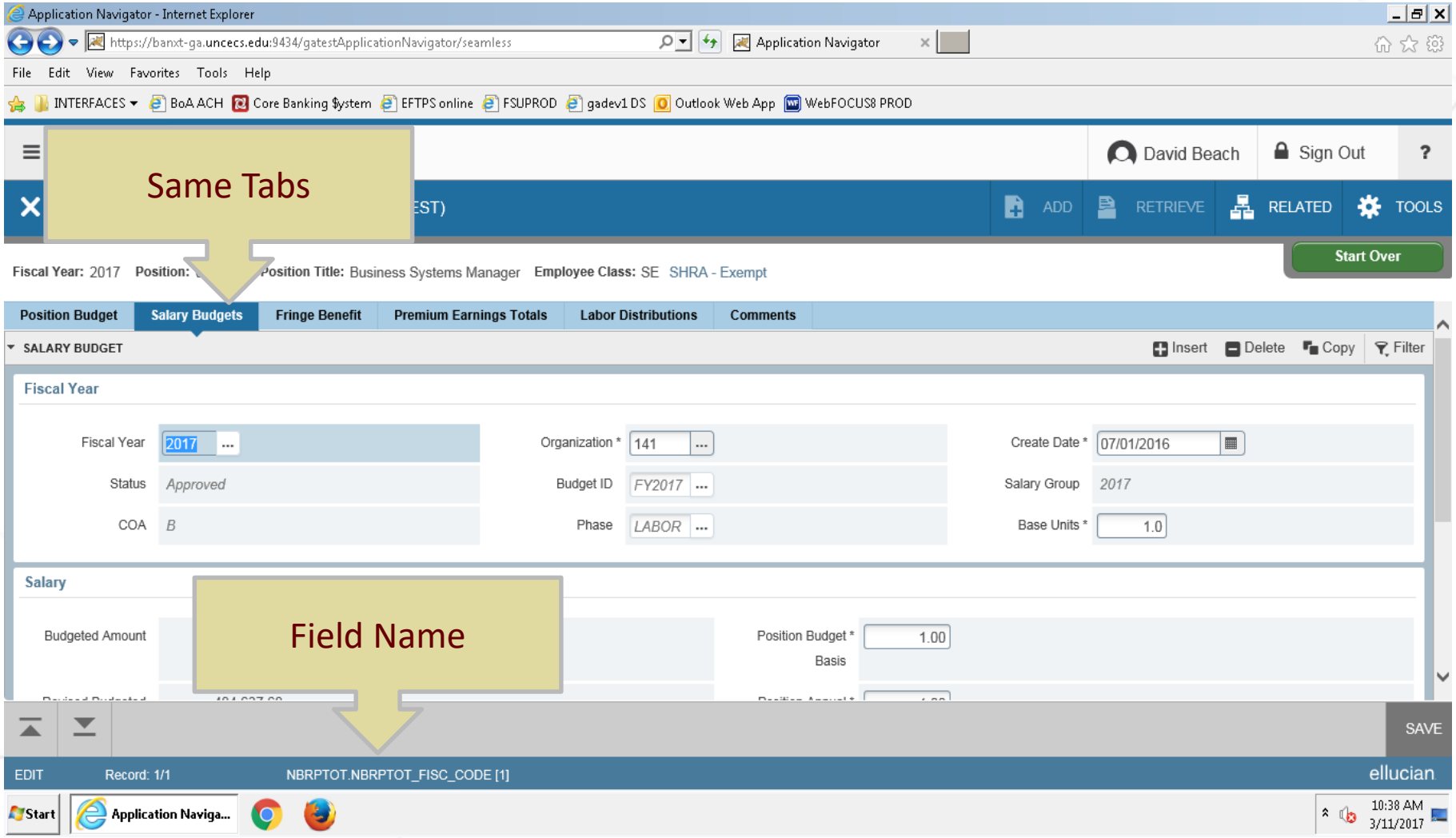
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David Beach
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Position Title: Business Systems Manager
Employee Class: SE SHRA - Exempt
Position Budget
Salary Budgets
Fringe Benefit
Premium Earnings Totals
Labor Distributions
Comments
SALARY BUDGET
Insert
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Copy
Filter
Fiscal Year
Fiscal Year 2017
Organization * 141
Create Date * 07/01/2016
Status Approved
Budget ID FY2017
Salary Group 2017
COA B
Phase LABOR
Base Units * 1.0
Salary
Budgeted Amount
Position Budget * 1.00
Basis
Field Name
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NBRPTOT.NBRPTOT_FISC_CODE [1]
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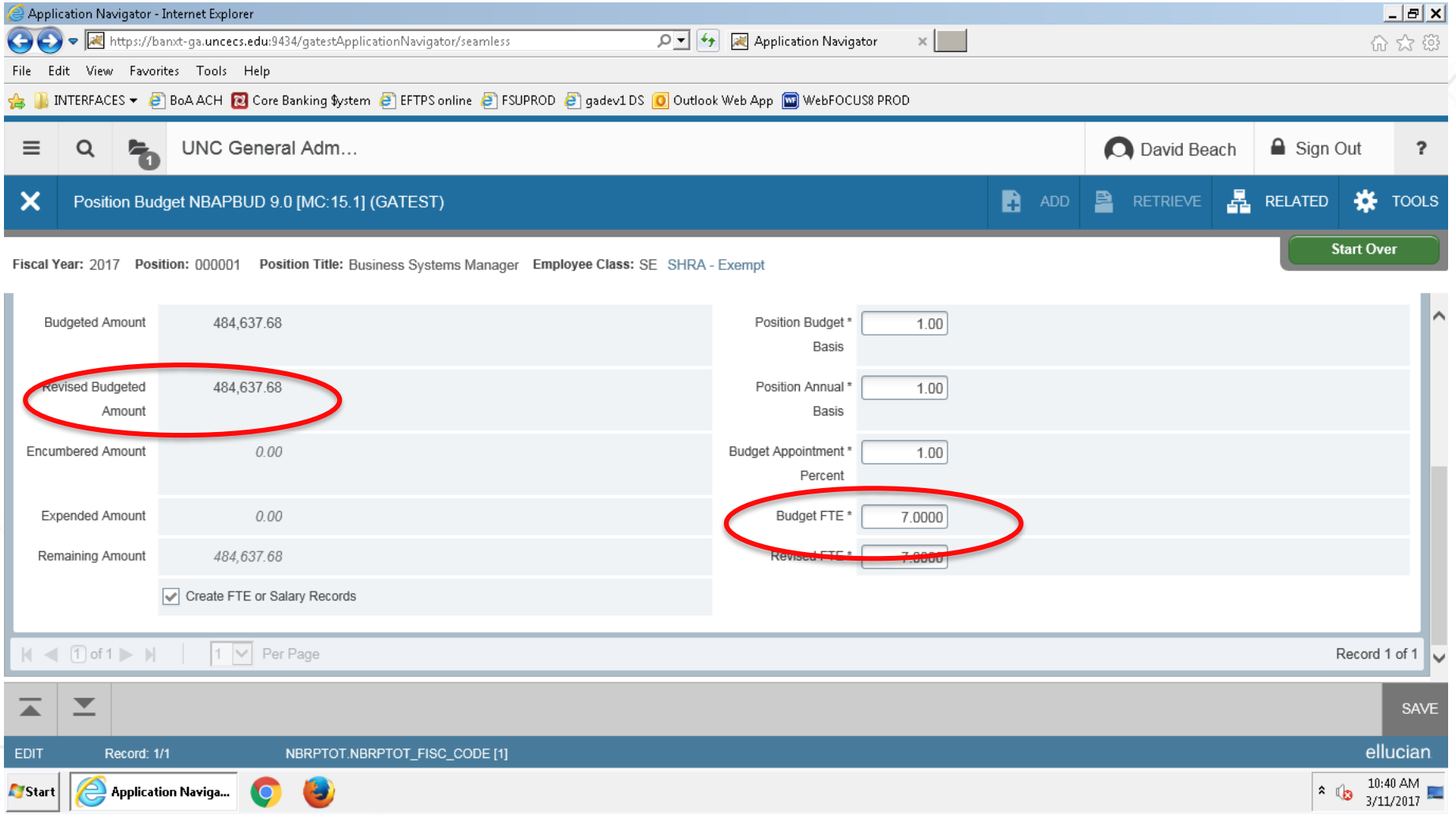
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David Beach
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Budgeted Amount 484,637.68
Revised Budgeted Amount 484,637.68
Encumbered Amount 0.00
Expended Amount 0.00
Remaining Amount 484,637.68
Create FTE or Salary Records
Position Budget * Basis 1.00
Position Annual * Basis 1.00
Budget Appointment * Percent 1.00
Budget FTE * 7.0000
Revised FTE * 7.0000
1 of 1
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Record 1 of 1
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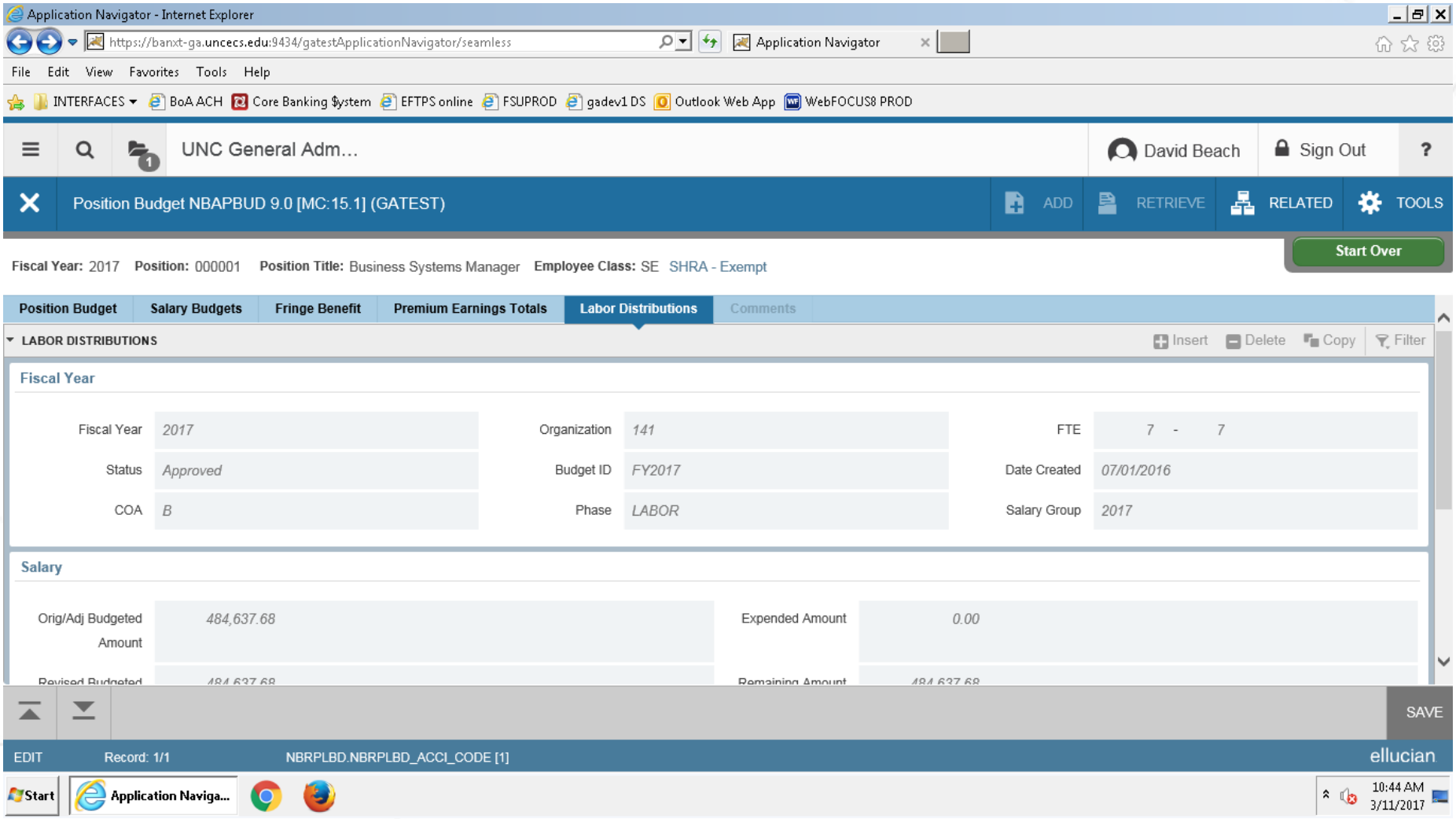
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Labor Distributions
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Fiscal Year 2017
Organization 141
FTE 7 - 7
Status Approved
Budget ID FY2017
Date Created 07/01/2016
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Salary Group 2017
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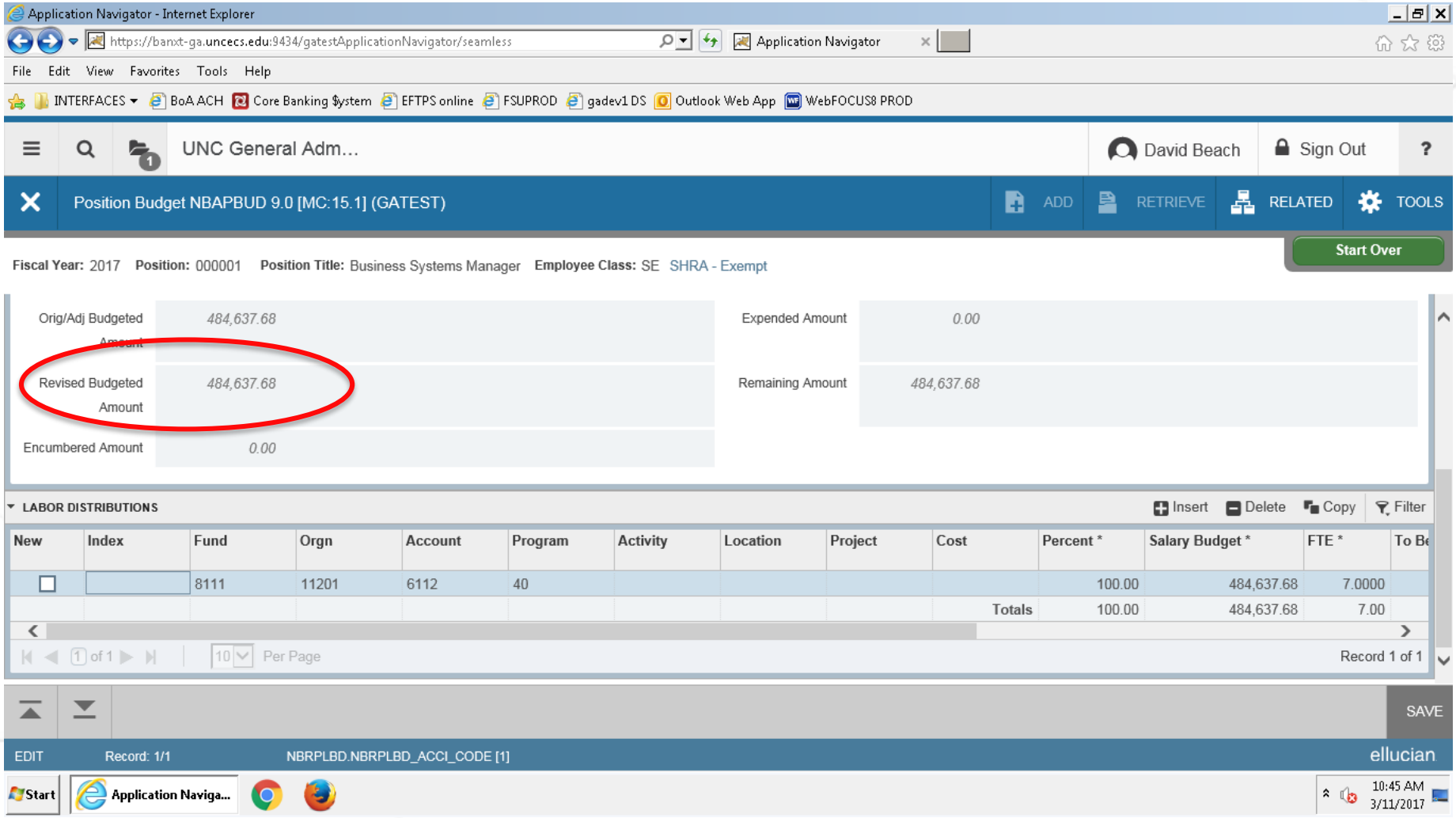
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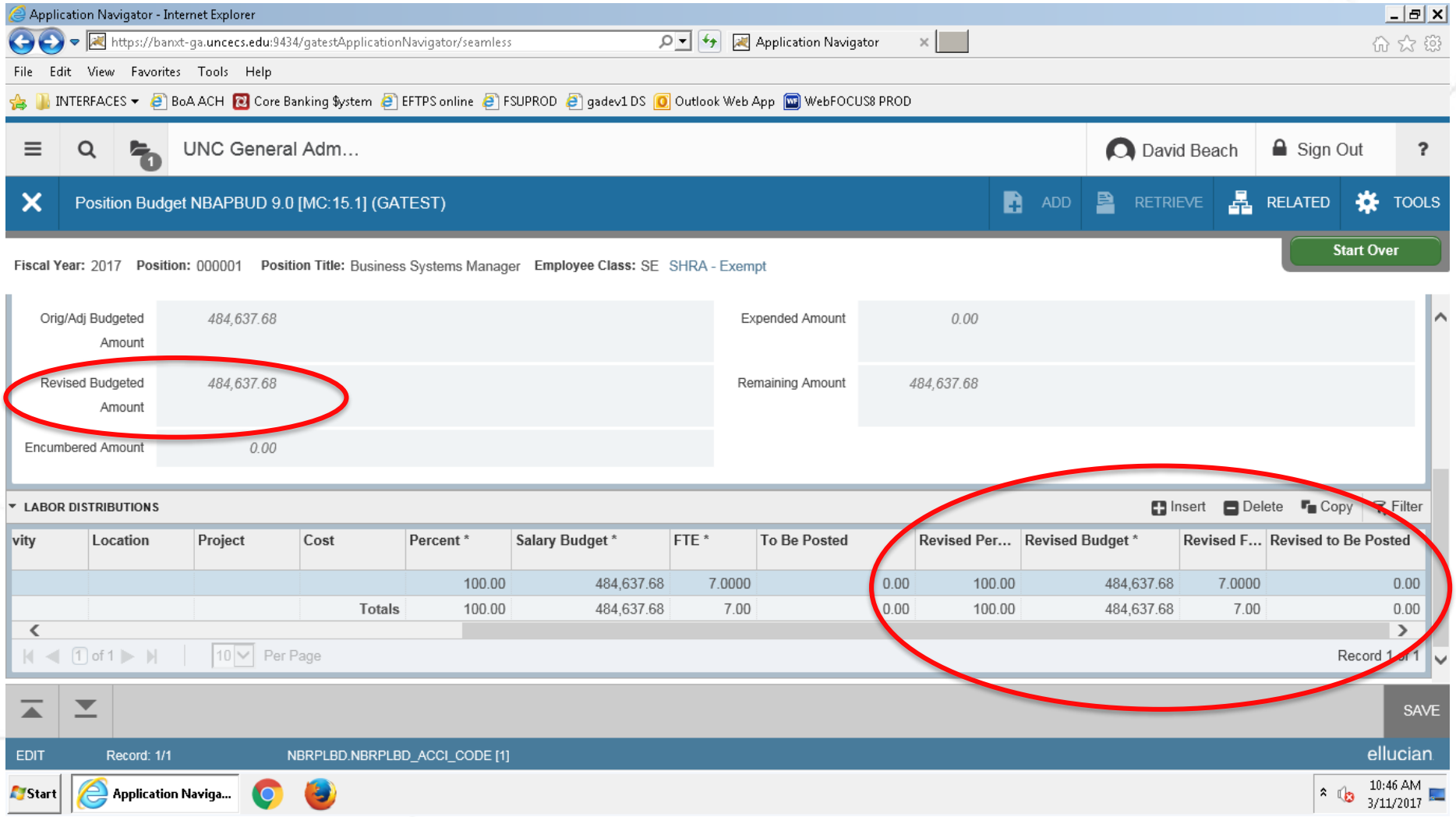
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UNC-GA Customizations by Ellucian

READY NOW

- UNC 001 – Position Control Budgeting

EXPECTED LATER THIS YEAR

- UNC 006 – Student Withdrawal Limits
- UNC 007 – Course Repeat Limits

Payroll Interfaces

- PWRPREG – Payroll Register was successfully run through Banner 9 job submission with essentially no changes required.

- The complete payroll interface inventory of 36 job-submitted reports and processes will be tested in a GA Banner instance with campus data over the coming months.

- The inventory can and should be tested on your campus with UNC-GA support as each campus gets a Banner 9 instance ready.

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PAYROLL INTERFACE INVENTORY

description	type	name		description	type	name
pru401k	interface	pwr401k		secc	interface	pwrsecc
pru457b	interface	pwr457b		secu (in/out)	interface	pwrsecu
ACA reporting	interface	pwraca2		seanc	interface	pwrsenc
SHP/NCFlex	interface	pwrbenu		ssnv	interface	pwrssnv
foundation	interface	pwrcolf		standard	interface	pwrstnd
colonial	interface	pwrcoln		superior	interface	pwrsupv
Load Earn to MTIM	interface	pwrearn		tiaacref	interface	pwrtiaa
Eligibility	report	pwrelig		concordia	interface	pwrucci
Employment Security	interface	pwremsc		MoveTime	process	pwrmove
fidelity	interface	pwrfidl		LawTime	process	pwplawt
newhire	interface	pwrhire		SmartTime	process	pwpsmrt
imputed	interface	pwrimpu		overtime-comp payout	process	pwpocpp
liberty	interface	pwrlbty		overtime	process	pwpoprt
lifehelp	interface	pwrlhlp		leave update	process	pwplvup
rehired retiree	interface	pwrncon		Leave Roll	process	pwulrol
orbitid	interface	pwrobid		Payroll Bank Recon	report	pwrckrc
orbit	interface	pwrorbt		Registry Recon	report	pwrpreg
pagroup demographics	interface	pwrpagd		Payroll Comparison	report	pwrpycm
pagroup	interface	pwrpagr				

Custom Forms

- UNC-GA IT has begun work to convert customized Oracle forms such as those used for HR and Student Data Mart

- Stay tuned… A timeline for when these will be ready is being developed

NCAS Jobs

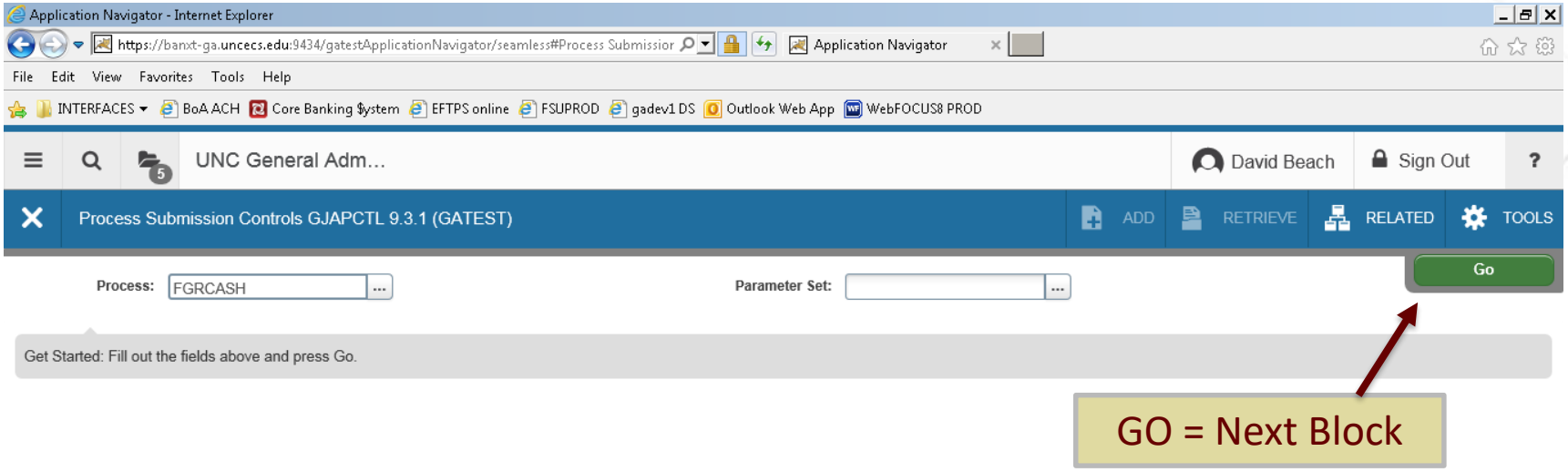
- Last year, while working with UNCA on Employee Profile development, WURNCAS, FWRR701 and WURR702 were run successfully through job submission on a campus test instance with no changes required.

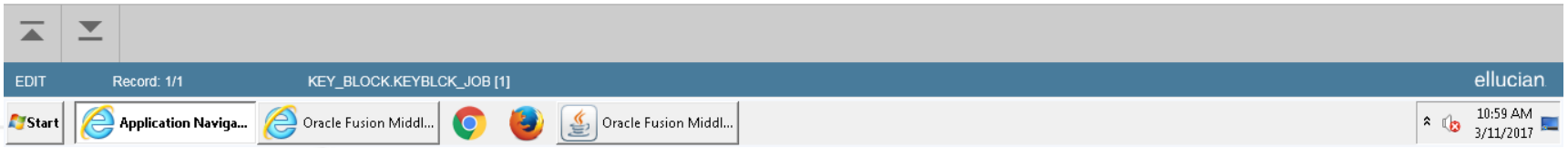
- The processes will be installed and tested with the latest Banner 9 release on a GA instance over the coming months.

- NCAS jobs can and should be tested on your campus as each campus gets a Banner 9 instance ready. UNC-GA support is available as needed.

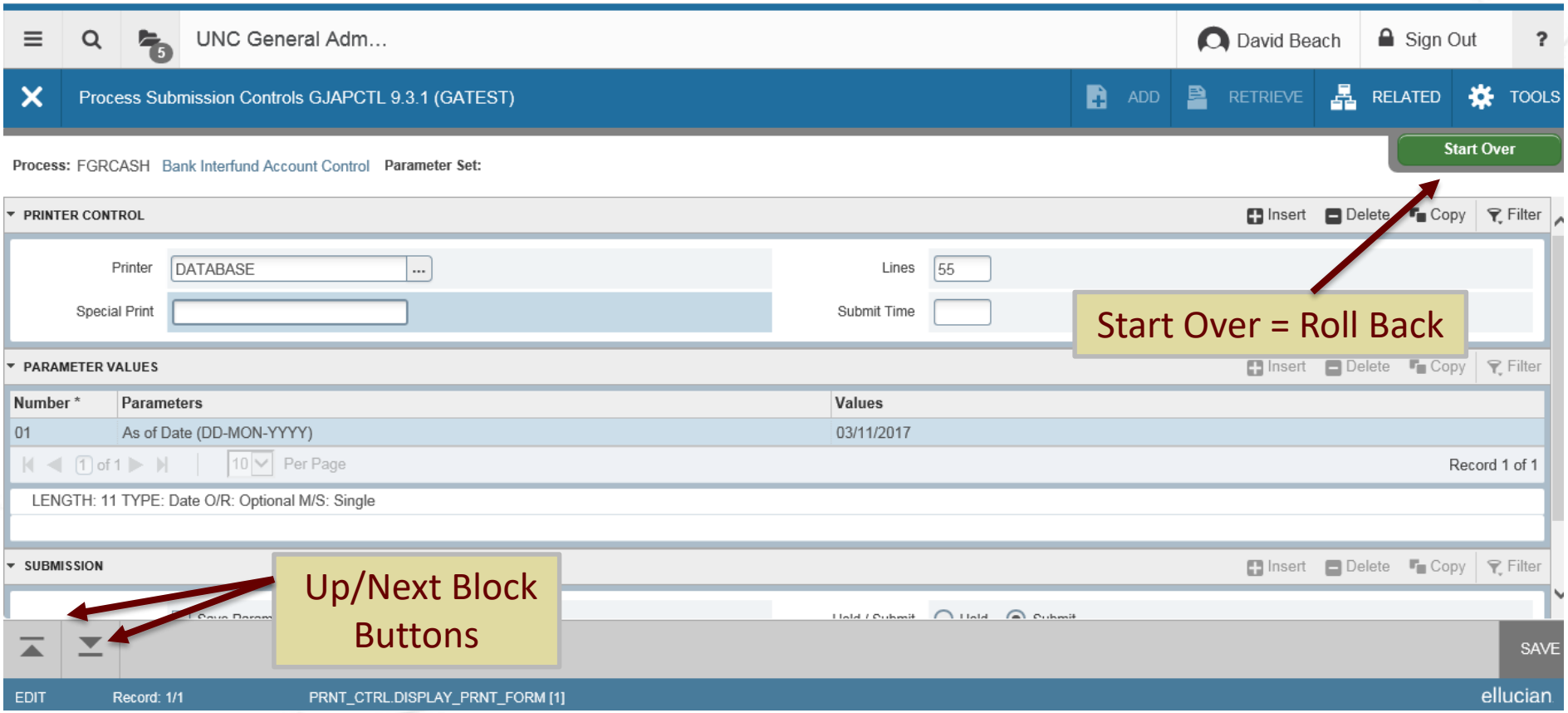
A few comments on job submission

JOB SUBMISSION





JOB SUBMISSION



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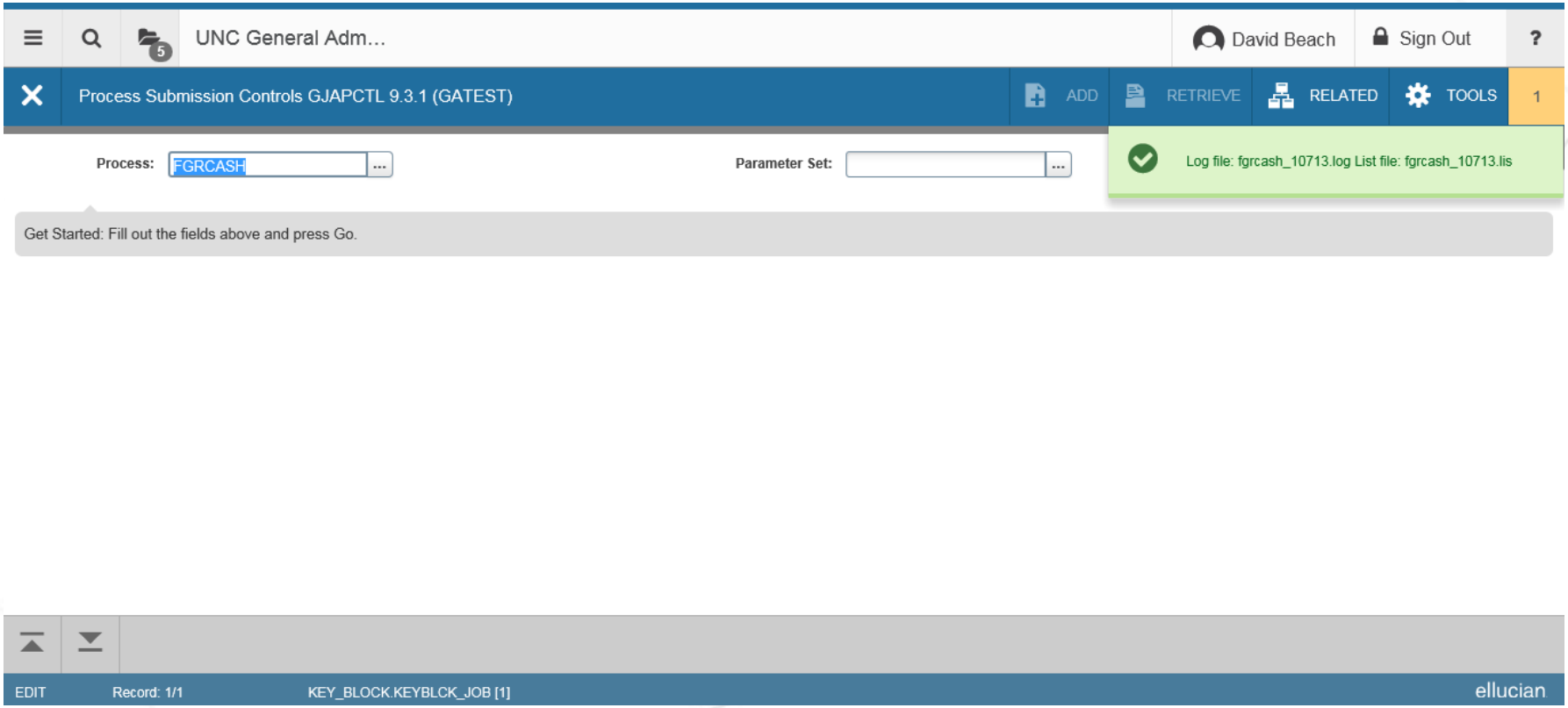
JOB SUBMISSION



UNIVERSITY OF NORTH CAROLINA
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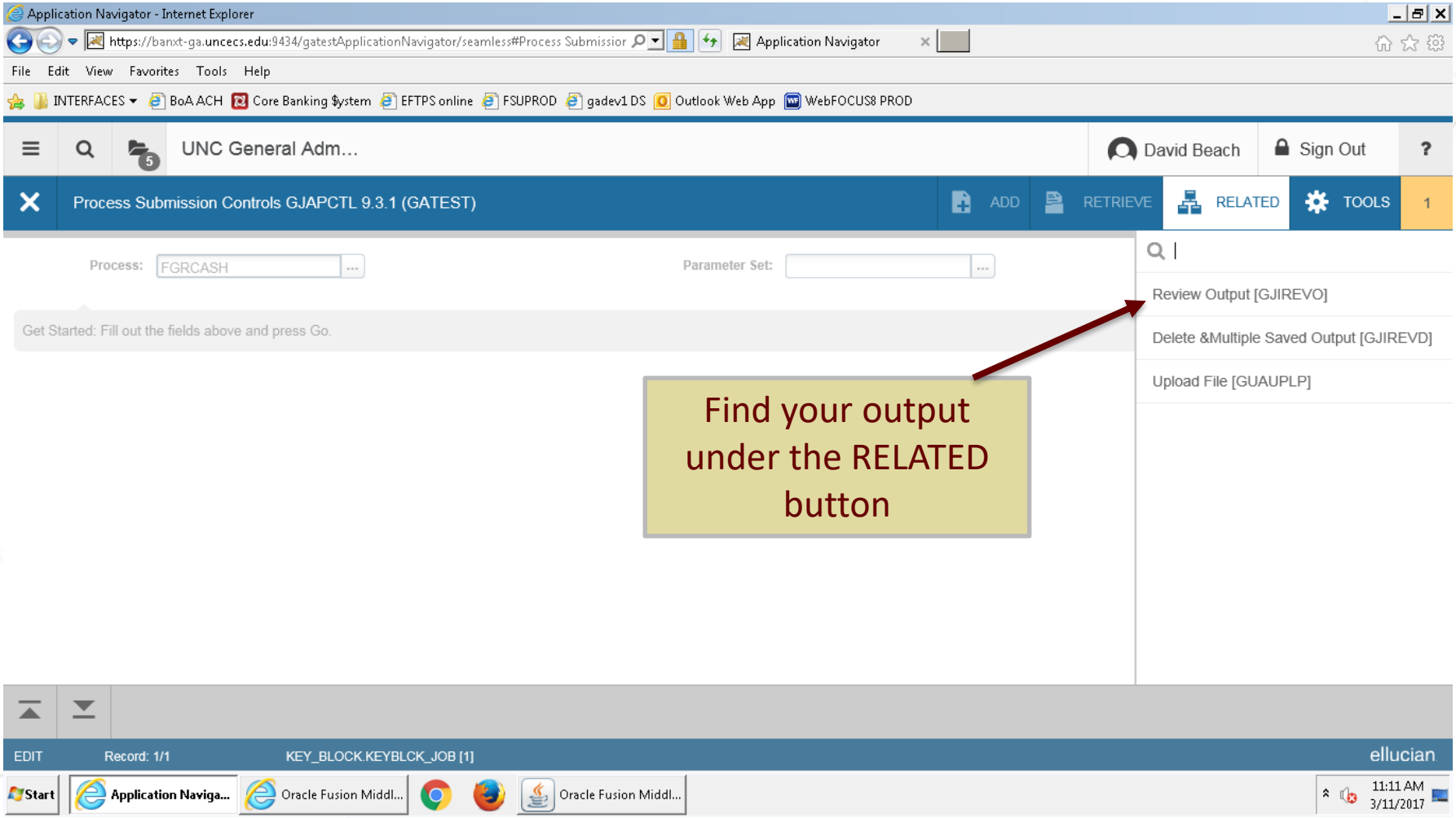
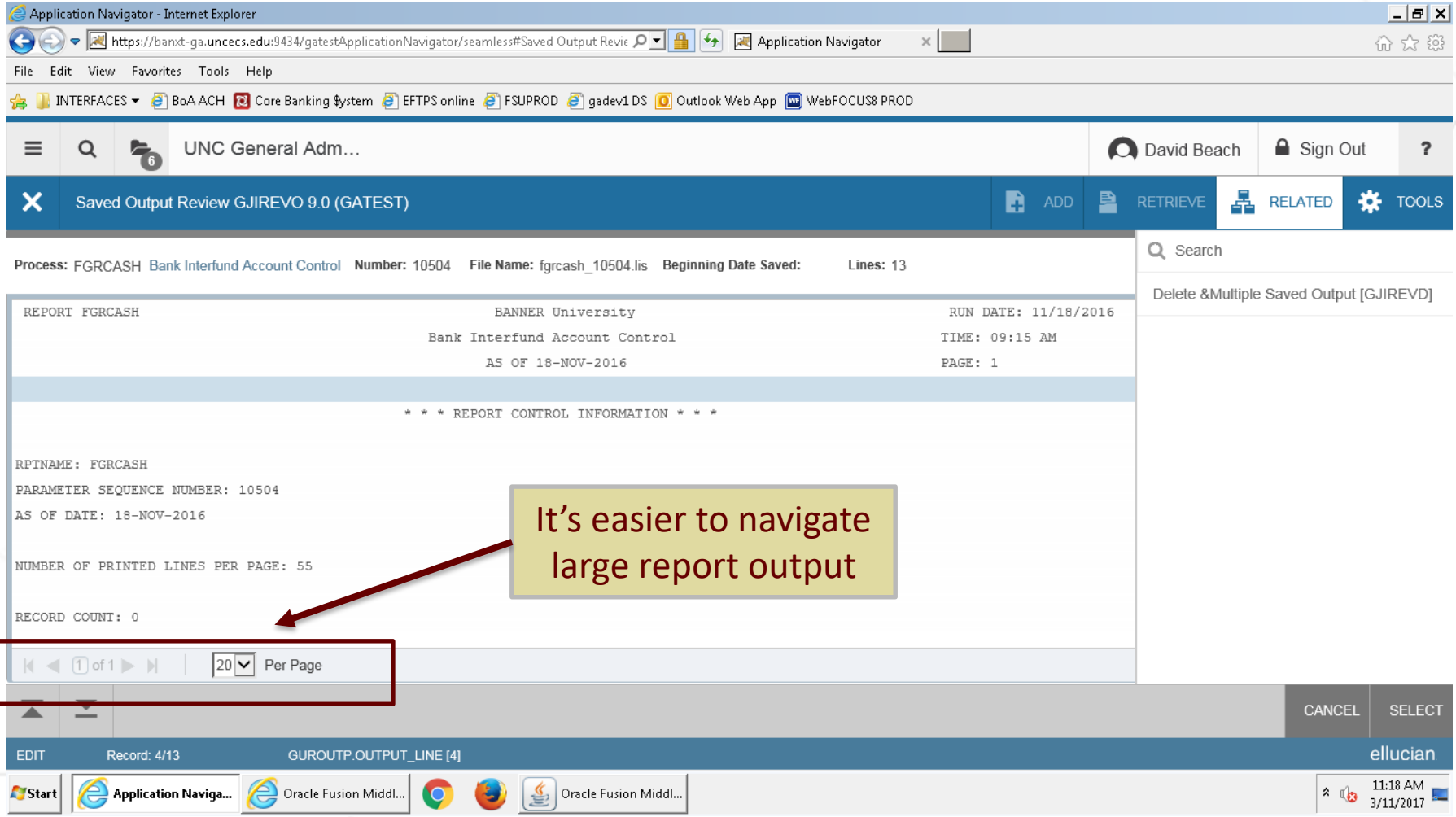
JOB SUBMISSION



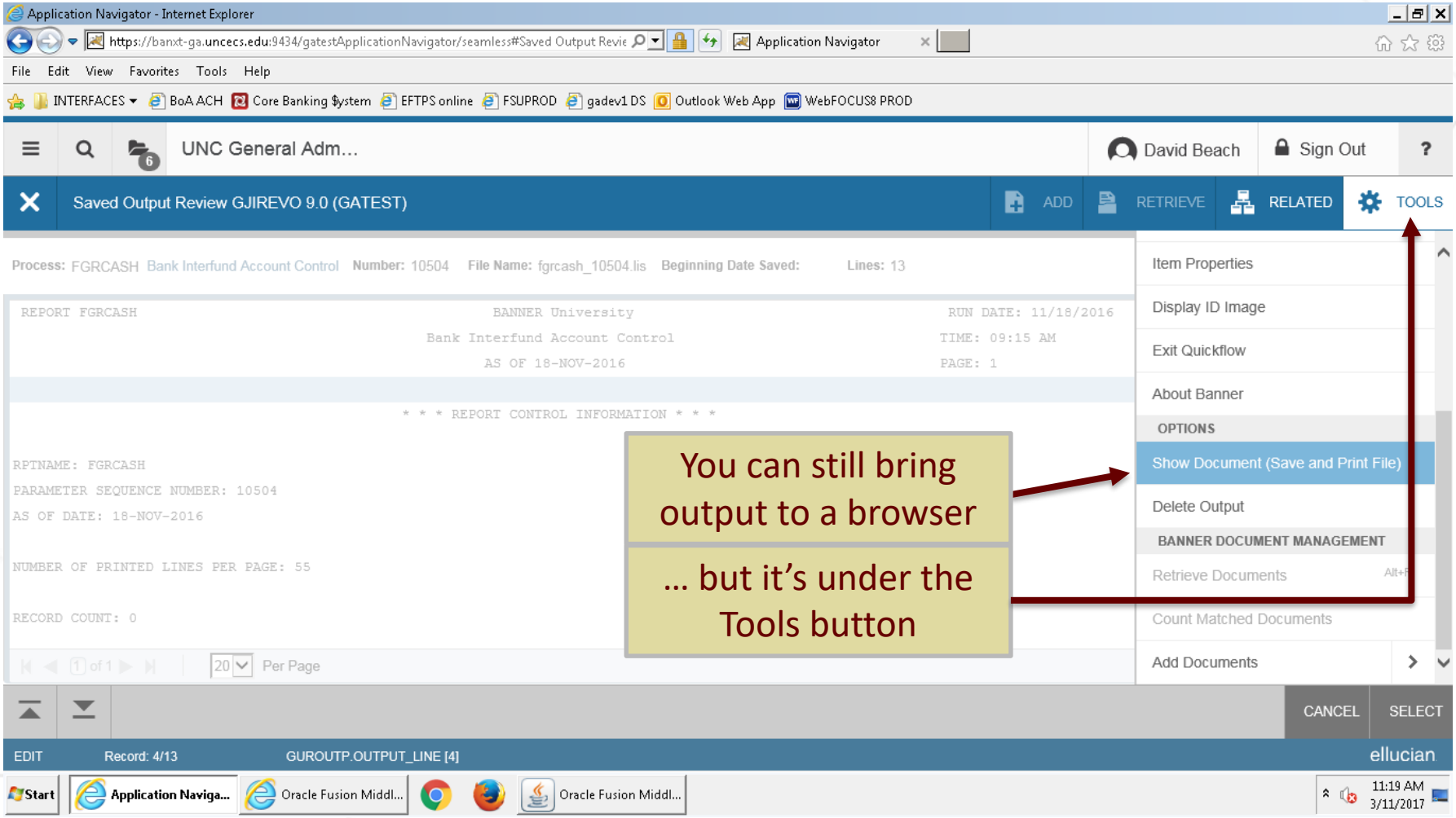
UNIVERSITY OF NORTH CAROLINA
A SYSTEM OF HIGHER LEARNING

JOB SUBMISSION



It's easier to navigate large report output

JOB SUBMISSION



You can still bring output to a browser

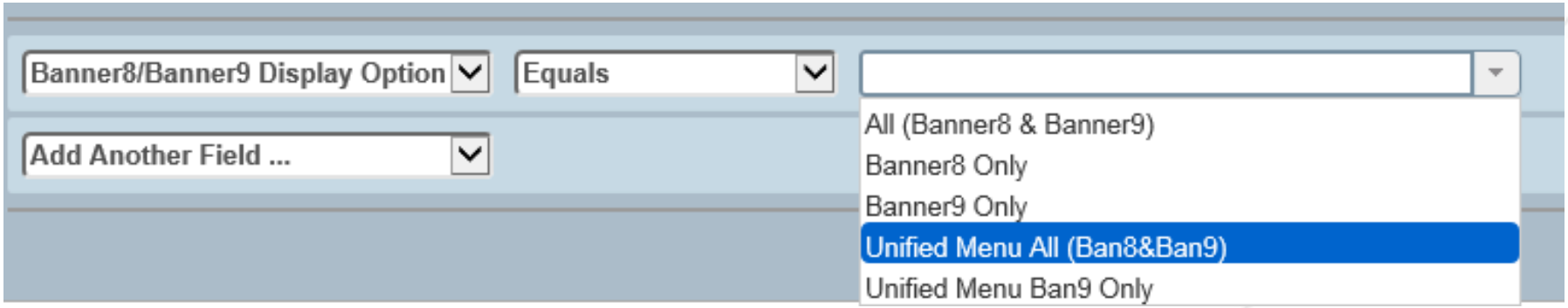
… but it's under the Tools button

COMMENT 2

We are hearing some universities have already formed XE teams and are working on nothing but XE.

Who wants to start?

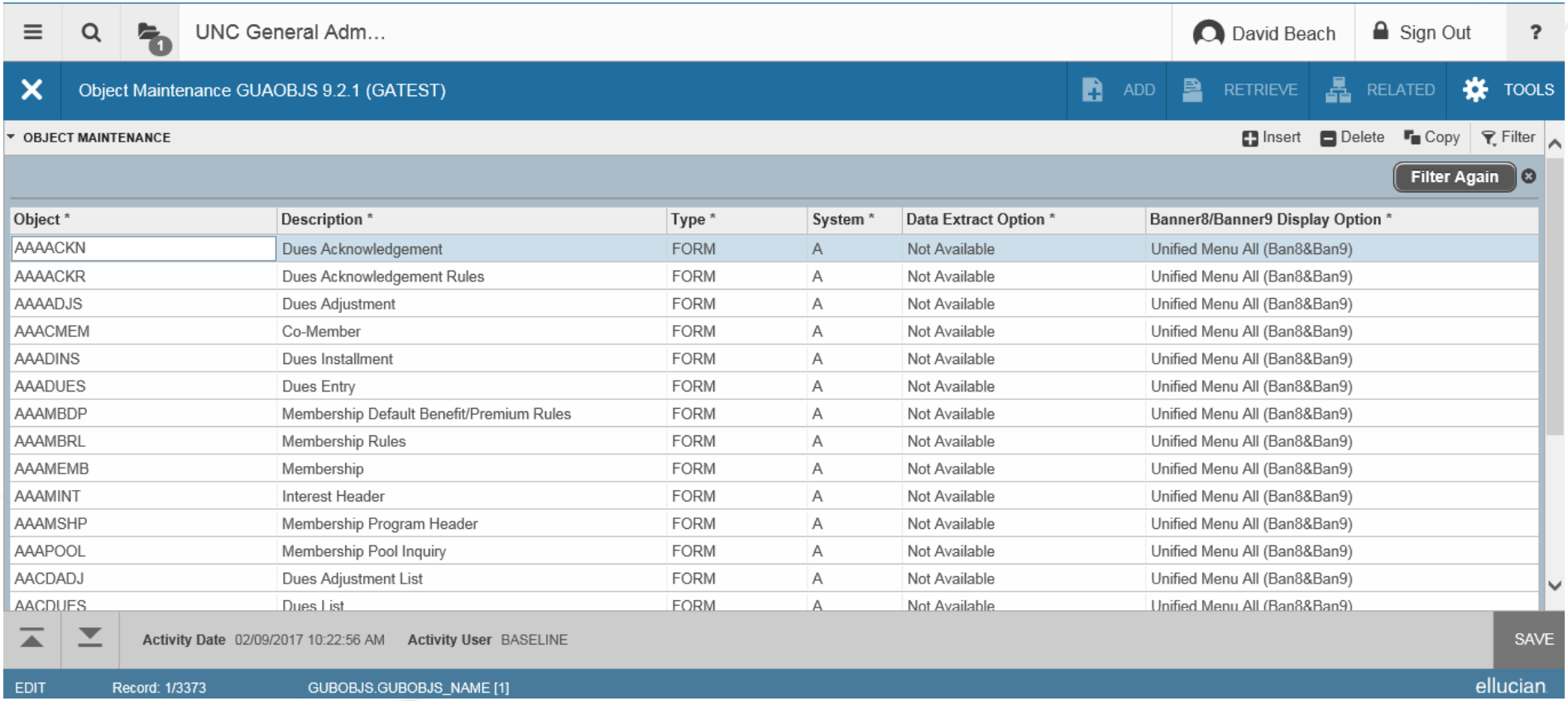
GUAOBJS



Set forms to display as Banner 8 or 9

UNIVERSITY OF NORTH CAROLINA
A SYSTEM OF HIGHER LEARNING

GUAOBJS

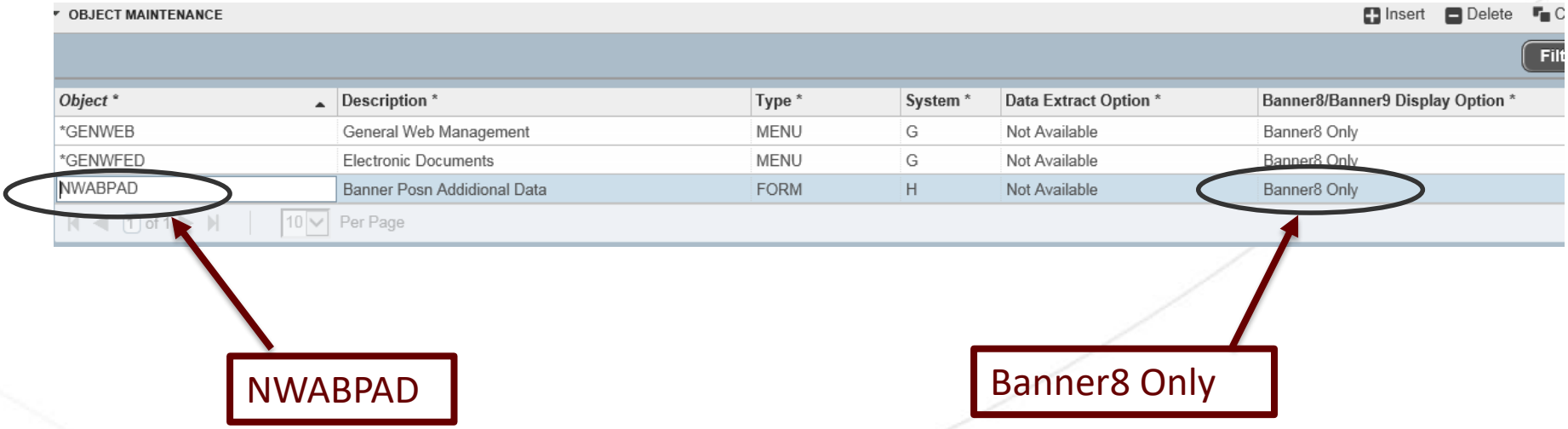


Object *	Description *	Type *	System *	Data Extract Option *	Banner8/Banner9 Display Option *
AAAACKN	Dues Acknowledgement	FORM	A	Not Available	Unified Menu All (Ban8&Ban9)
AAAACKR	Dues Acknowledgement Rules	FORM	A	Not Available	Unified Menu All (Ban8&Ban9)
AAAADJS	Dues Adjustment	FORM	A	Not Available	Unified Menu All (Ban8&Ban9)
AAACMEM	Co-Member	FORM	A	Not Available	Unified Menu All (Ban8&Ban9)
AAADINS	Dues Installment	FORM	A	Not Available	Unified Menu All (Ban8&Ban9)
AAADUES	Dues Entry	FORM	A	Not Available	Unified Menu All (Ban8&Ban9)
AAAMBDP	Membership Default Benefit/Premium Rules	FORM	A	Not Available	Unified Menu All (Ban8&Ban9)
AAAMBRL	Membership Rules	FORM	A	Not Available	Unified Menu All (Ban8&Ban9)
AAAMEMB	Membership	FORM	A	Not Available	Unified Menu All (Ban8&Ban9)
AAAMINT	Interest Header	FORM	A	Not Available	Unified Menu All (Ban8&Ban9)
AAAMSHP	Membership Program Header	FORM	A	Not Available	Unified Menu All (Ban8&Ban9)
AAAPOOL	Membership Pool Inquiry	FORM	A	Not Available	Unified Menu All (Ban8&Ban9)
AACDADJ	Dues Adjustment List	FORM	A	Not Available	Unified Menu All (Ban8&Ban9)
AACDUES	Dues List	FORM	A	Not Available	Unified Menu All (Ban8&Ban9)

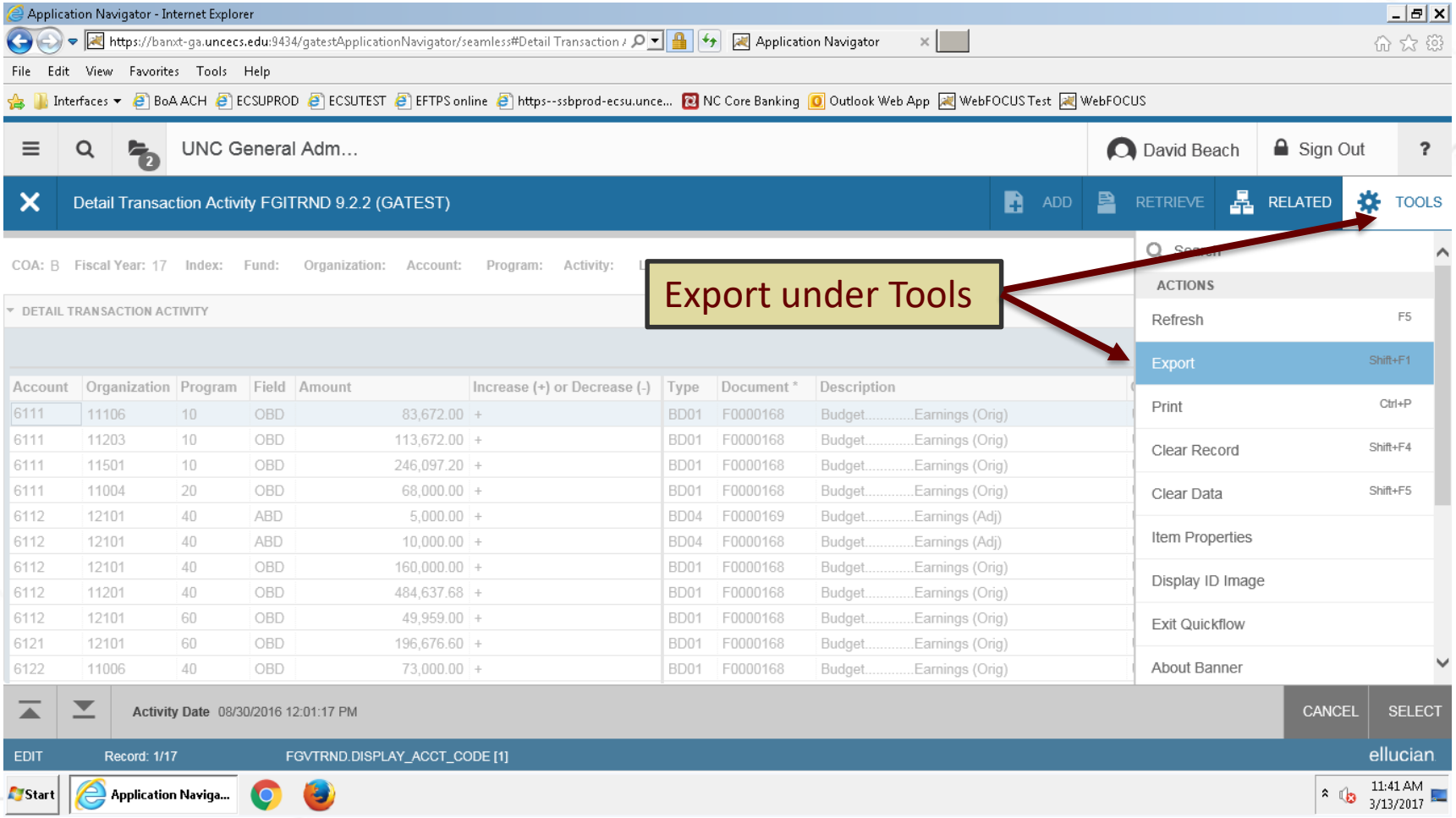
Most baseline forms set up to display either Banner 8 or 9

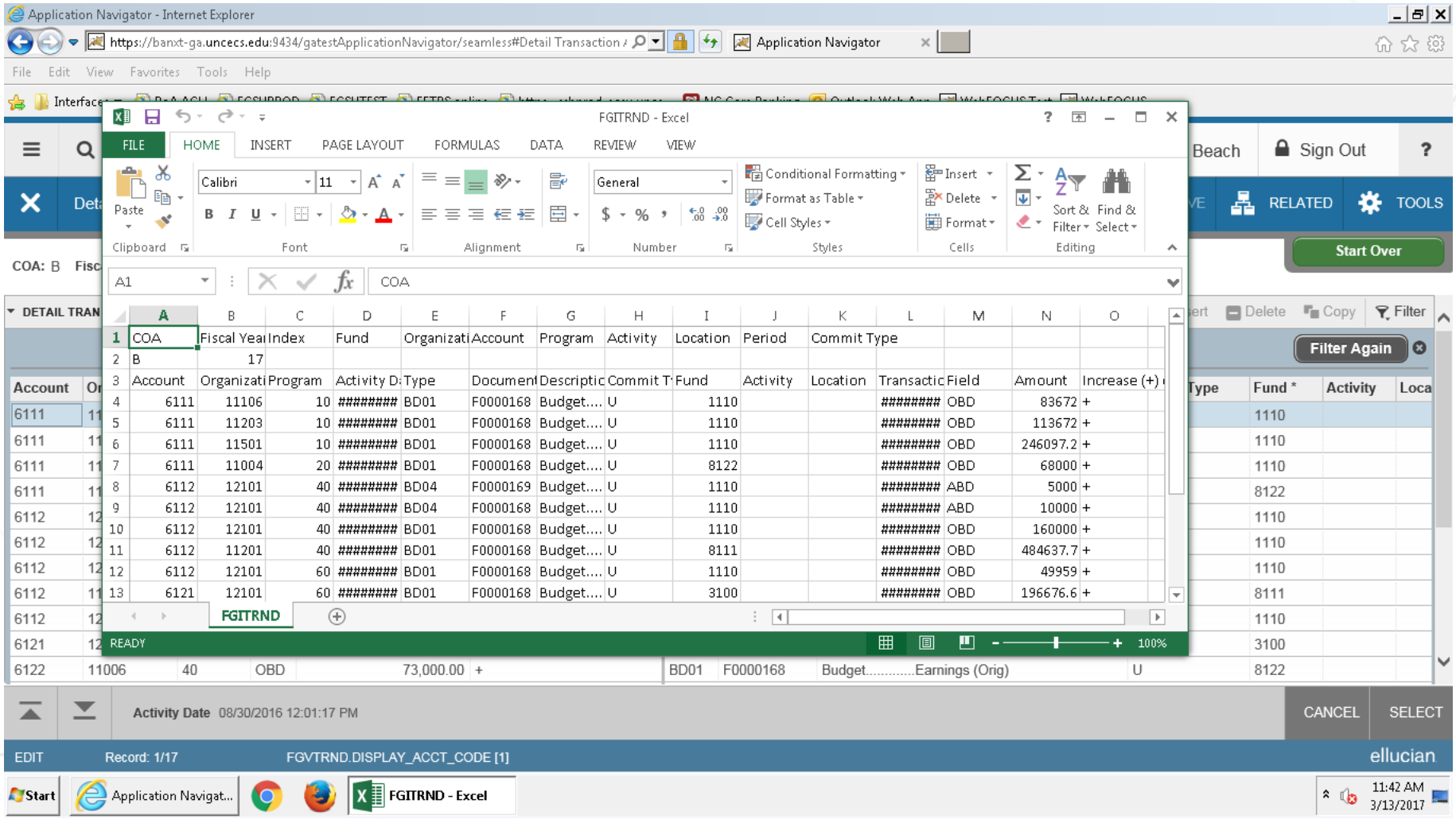
GUAOBJS

But some customized forms are still Banner 8



Custom forms are set to display as Banner 8 only


Application Navigator - Internet Explorer
https://banxt-ga.uncecs.edu:9434/gatestApplicationNavigator/seamless#Detail Transaction
Application Navigator
File Edit View Favorites Tools Help
Interfaces BoA ACH ECSUPROD ECSUTEST EFTPS online https--ssbprod-ecsu.unce... NC Core Banking Outlook Web App WebFOCUS Test WebFOCUS
UNC General Adm...
David Beach
Sign Out
Detail Transaction Activity FGITRND 9.2.2 (GATEST)
ADD
RETRIEVE
RELATED
TOOLS
COA: B Fiscal Year: 17 Index: Fund: Organization: Account: Program: Activity:
DETAIL TRANSACTION ACTIVITY
Export under Tools
ACTIONS
Refresh F5
Export Shift+F1
Print Ctrl+P
Clear Record Shift+F4
Clear Data Shift+F5
Item Properties
Display ID Image
Exit Quickflow
About Banner
Account Organization Program Field Amount Increase (+) or Decrease (-) Type Document * Description
6111 11106 10 OBD 83,672.00 + BD01 F0000168 Budget.....Earnings (Orig)
6111 11203 10 OBD 113,672.00 + BD01 F0000168 Budget.....Earnings (Orig)
6111 11501 10 OBD 246,097.20 + BD01 F0000168 Budget.....Earnings (Orig)
6111 11004 20 OBD 68,000.00 + BD01 F0000168 Budget.....Earnings (Orig)
6112 12101 40 ABD 5,000.00 + BD04 F0000169 Budget.....Earnings (Adj)
6112 12101 40 ABD 10,000.00 + BD04 F0000168 Budget.....Earnings (Adj)
6112 12101 40 OBD 160,000.00 + BD01 F0000168 Budget.....Earnings (Orig)
6112 11201 40 OBD 484,637.68 + BD01 F0000168 Budget.....Earnings (Orig)
6112 12101 60 OBD 49,959.00 + BD01 F0000168 Budget.....Earnings (Orig)
6121 12101 60 OBD 196,676.60 + BD01 F0000168 Budget.....Earnings (Orig)
6122 11006 40 OBD 73,000.00 + BD01 F0000168 Budget.....Earnings (Orig)
Activity Date 08/30/2016 12:01:17 PM
CANCEL
SELECT
EDIT Record: 1/17 FGVTRND.DISPLAY_ACCT_CODE [1]
ellucian
Start
Application Naviga...
11:41 AM
3/13/2017


Application Navigator - Internet Explorer
https://banxt-ga.uncecs.edu:9434/gatestApplicationNavigator/seamless#Detail Transaction
Application Navigator
File Edit View Favorites Tools Help
FGITRND - Excel
FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW
Calibri 11
General
Conditional Formatting
Format as Table
Cell Styles
Insert
Delete
Format
Sort & Filter
Find & Select
Clipboard Font Alignment Number Styles Cells Editing
A1 COA
COA Fiscal Year Index Fund Organizati Account Program Activity Location Period Commit Type
B 17
Account Organizati Program Activity D: Type Document Descriptic Commit T: Fund Activity Location Transactic Field Amount Increase (+)
6111 11106 10 ######## BD01 F0000168 Budget.... U 1110 ######## OBD 83672 +
6111 11203 10 ######## BD01 F0000168 Budget.... U 1110 ######## OBD 113672 +
6111 11501 10 ######## BD01 F0000168 Budget.... U 1110 ######## OBD 246097.2 +
6111 11004 20 ######## BD01 F0000168 Budget.... U 8122 ######## OBD 68000 +
6112 12101 40 ######## BD04 F0000169 Budget.... U 1110 ######## ABD 5000 +
6112 12101 40 ######## BD04 F0000168 Budget.... U 1110 ######## ABD 10000 +
6112 12101 40 ######## BD01 F0000168 Budget.... U 1110 ######## OBD 160000 +
6112 12201 40 ######## BD01 F0000168 Budget.... U 8111 ######## OBD 484637.7 +
6112 12101 60 ######## BD01 F0000168 Budget.... U 1110 ######## OBD 49959 +
6121 12101 60 ######## BD01 F0000168 Budget.... U 3100 ######## OBD 196676.6 +
FGITRND
READY
100%
Sign Out
RELATED
TOOLS
Start Over
Filter Again
Account Type Fund * Activity Loca
6122 11006 40 OBD 73,000.00 + BD01 F0000168 Budget.....Earnings (Orig) U 8122
Activity Date 08/30/2016 12:01:17 PM
CANCEL
SELECT
EDIT Record: 1/17 FGVTRND.DISPLAY_ACCT_CODE [1]
ellucian
Start
Application Navigat...
FGITRND - Excel
11:42 AM
3/13/2017

COMMENT 3

Would like to see or hear when other schools are thinking on going live on Banner XE.

Also would like to hear if others schools are going live with XE globally (all modules) or a more staggered approach...so for example is Finance going live at a different time from Student or HR.

I see lots of chatter on e-Communities

e-Communities

Nate Conn *84 posts since Jan 12, 2015*

Re: Other Small Universities Implementing Administrative Pages? Mar 9, 2017 7:17 AM

Hi AmyJo,

I would recommend deploying ALL Banner 9 Admin Pages modules, as it's just as easy to deploy all of them as it is one. The same steps are necessary and the same number of war files are generated as the result: BannerAdmin.war, BannerAdmin.ws.war, bannerHelp.war . That and Ellucian is desupporting all modules of Banner 8 Forms Dec. 31, 2018, not just a select few. :)

We chose not to to configure "seamless" navigation in the Banner Forms/App Navigator as from our perspective there's no benefit if the end game there will be no Banner forms supported. And seeing the defects out there for "seamless navigation" it seems to be anything but seamless. That's not to say you can't run Banner 8 Forms and Banner 9 Admin Pages in parallel...you can. That's what we're doing and it eases the transition as we can roll Banner 9 Admin Pages in production without publicizing the URL and allow the module managers and power users to test and find defects and at the same time get more comfortable with it. All that without jumping through hoops and eliminating more variables/defects in testing the "seamless" navigation.

Another recommendation, make sure you have a module manager in each module to lead and sign off on the testing of his/her module.

e-Communities

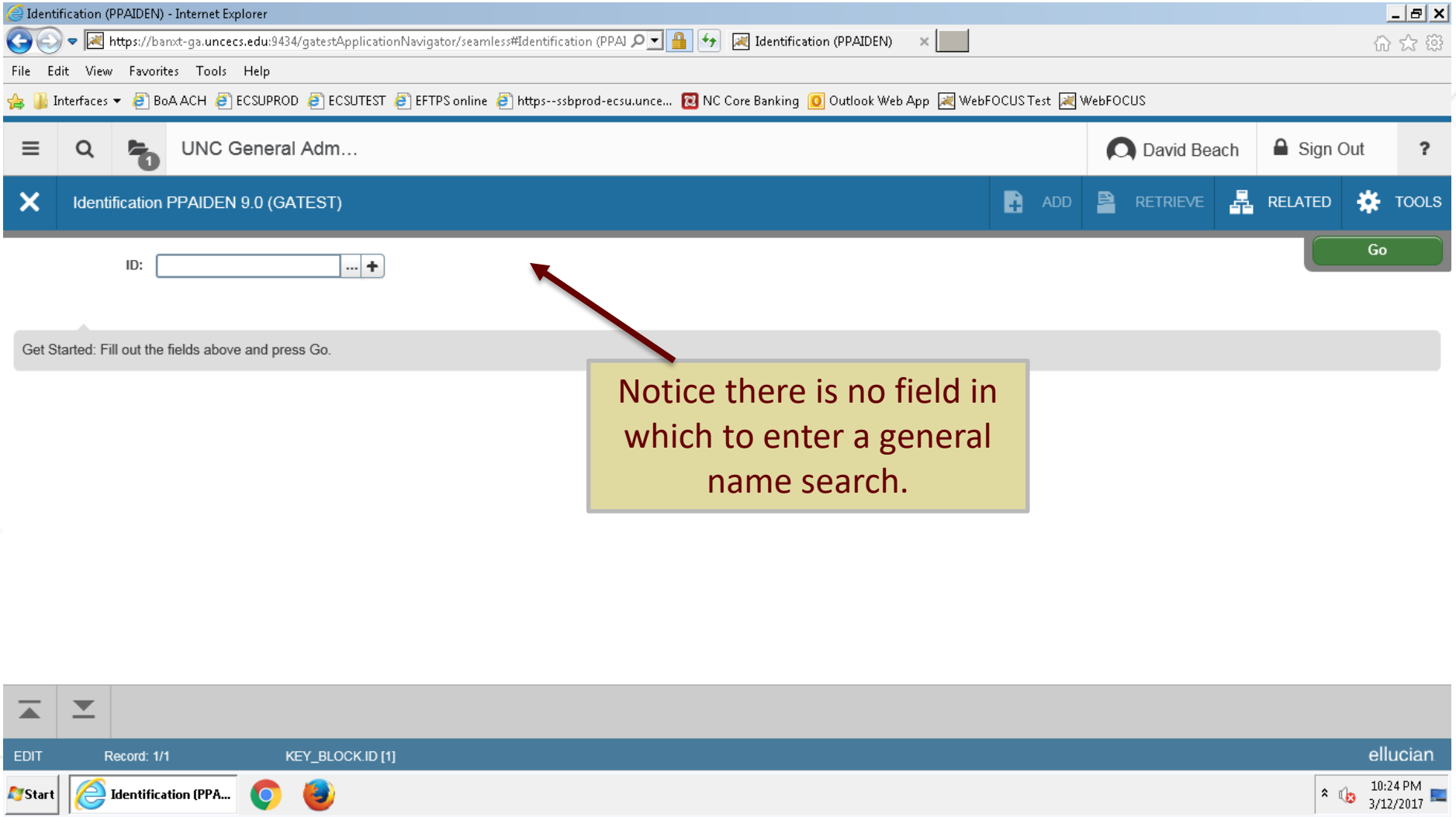
- Many seem to be transforming all modules and giving users time (months) to get comfortable

- I also see a lot of things that imply users should take their time with the existing release of transformed Administrative pages

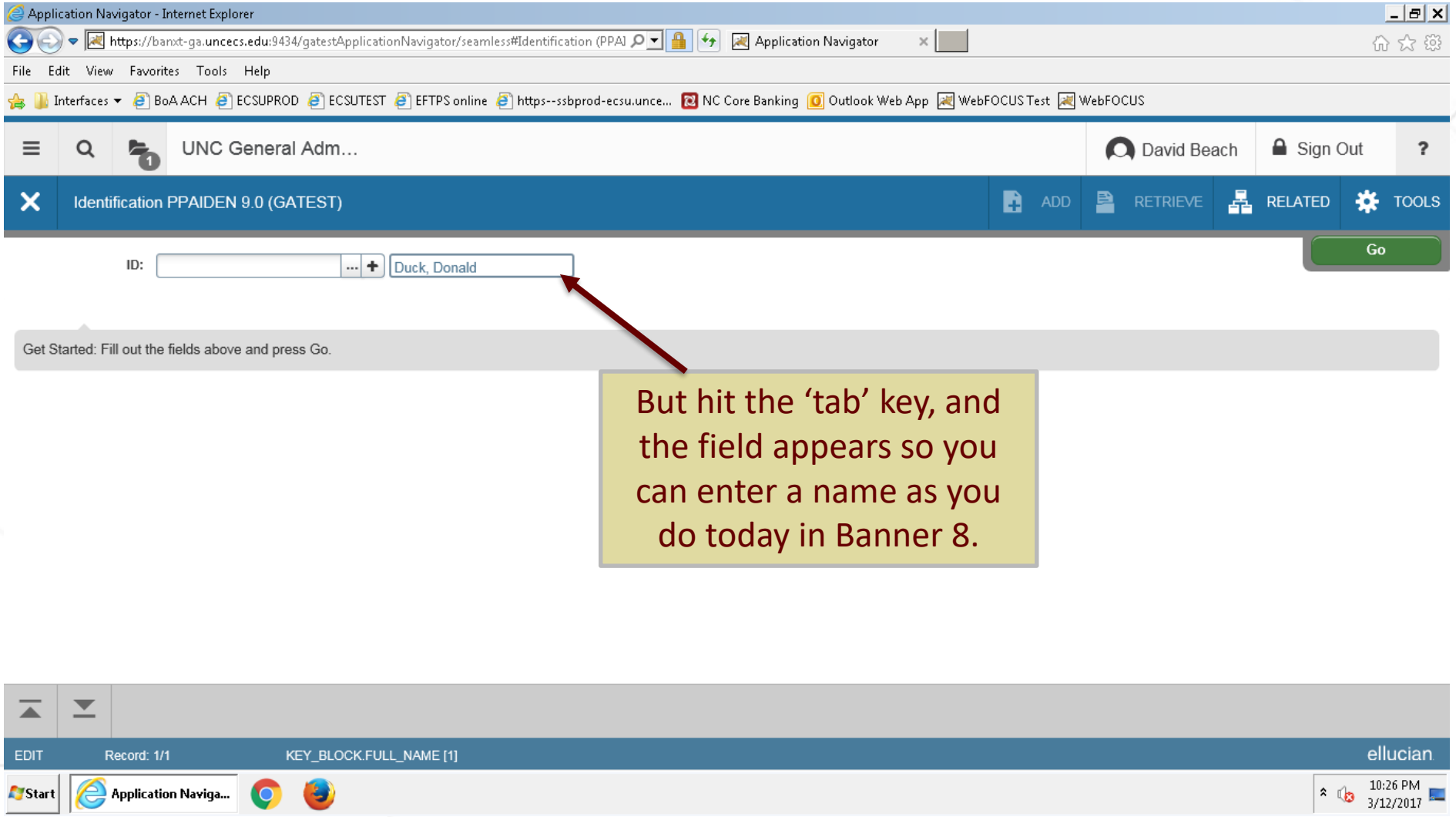
e-Communities

Pages like SPAIDEN(really any Form that has ID in the key block), no name field is shown to query, user must know to tab so it is shown and used to query. Created CASE 01616276 2017-01-30 for Ellucian to address bad user interfacing issue. Defect was created by Ellucian 2017-02-09 CR-000145977 - Banner Admin does not show Name field on %IDEN forms; Ellucian cancelled defect saying it's working as it should in Banner 9.x; yet it comes up again and again in our User Testing.

e-Communities

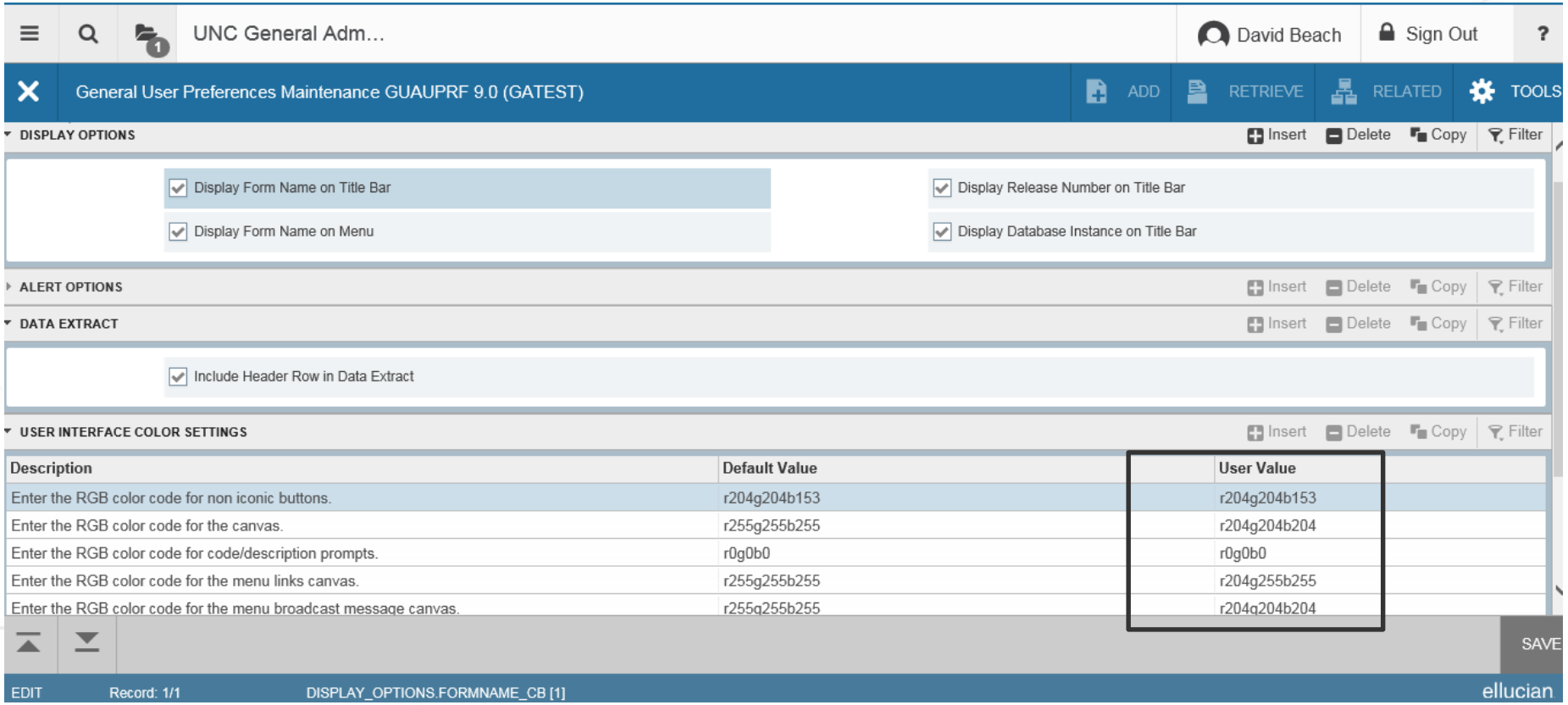


e-Communities

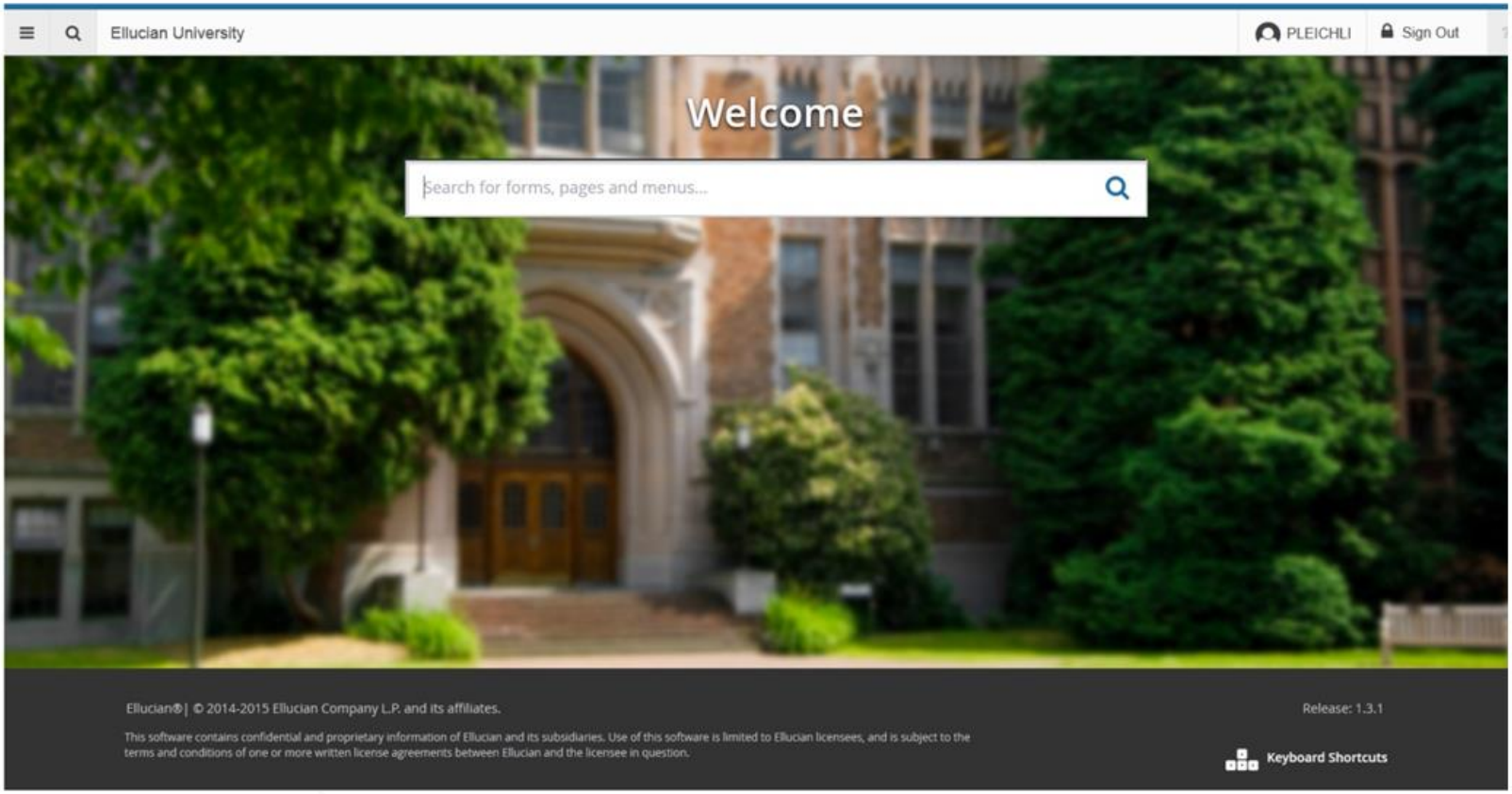


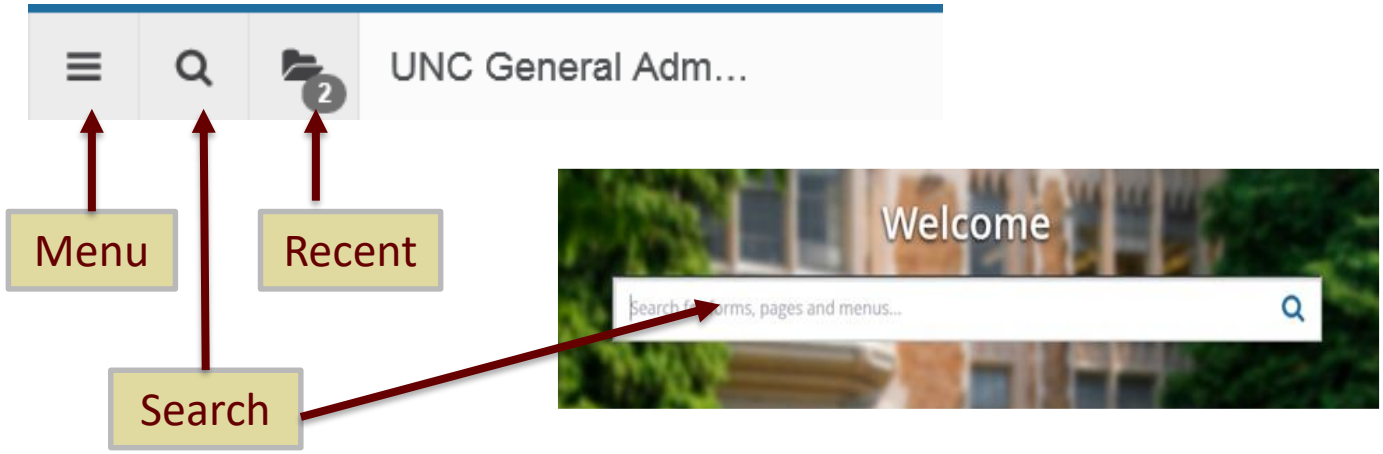
e-Communities

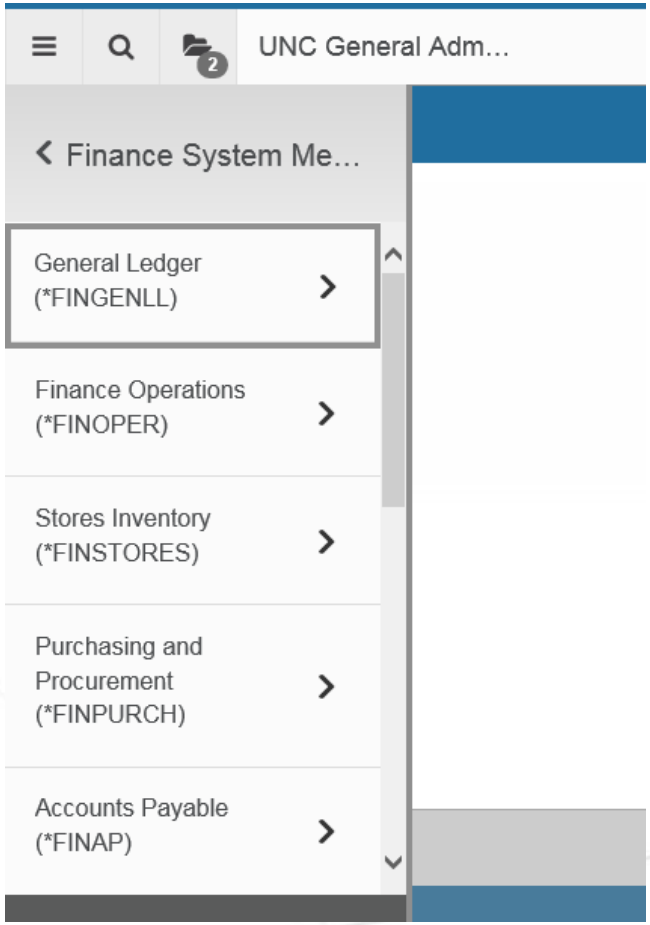
- GUAUPRF doesn't appear to honor your personal color changes. At least not yet.



Application Navigator




UNC General Adm...
2
Menu
Recent
Search
Welcome
Search forms, pages and menus...



NEXT BLOCK IS NOW "NEXT SECTION"

- Next Block (used to Be Ctrl+PgDn)
- Now Next Section / Go (Alt+PgDn)

Good sources for understanding how to use Application Navigator

ellucian

Banner Transformed
Getting Started With Your Administrative Applications

Release 9.0
October 2015

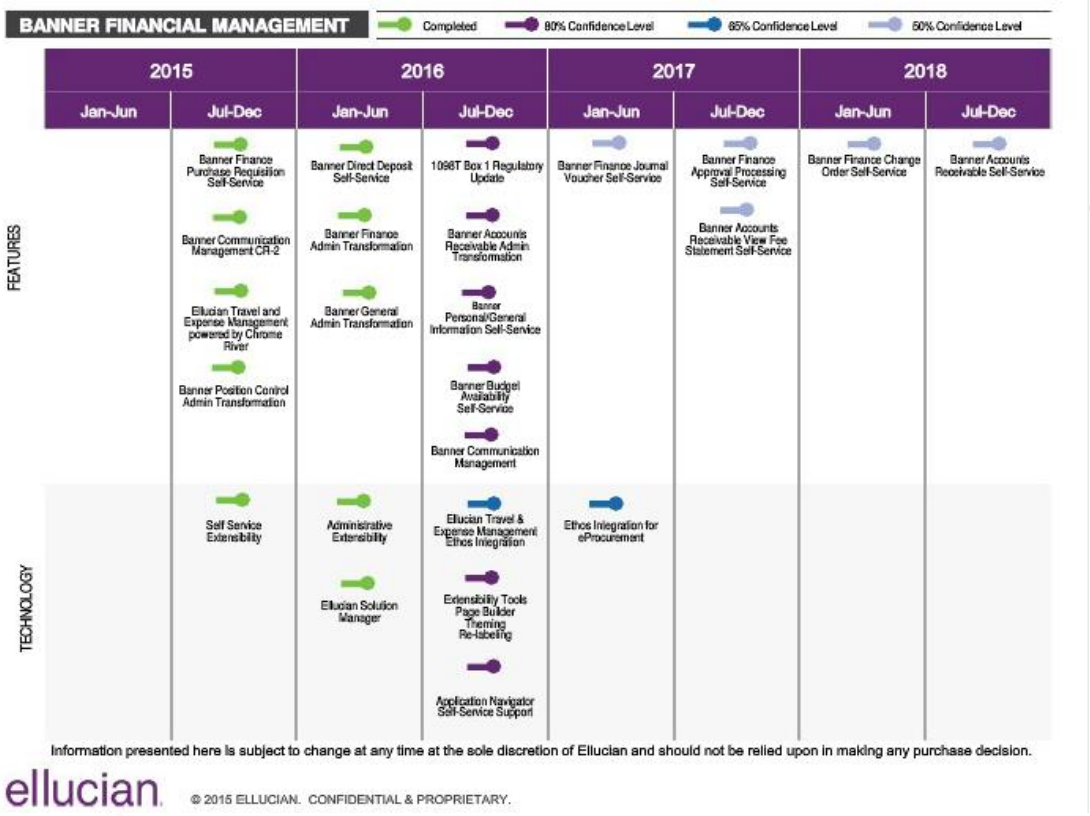
- Basic Navigation
- Keyboard Shortcuts

Campuses with nice content:

- Mississippi State
- Utah State
- UNC Greensboro

Continue to Research the "XE" Apps

- Self-Service Application replacement



Apps Available Today

- Finance
  - Purchase Requisition
- HR/Payroll
  - Employee Profile
  - Position Description

IT organizations would like to learn from implementing EE Profile as one of the first “XE” apps.

End users need to know that supervisor data on the NBAJOBS record needs to be accurate to make this work.

On the Finance Roadmap this year

- Budget Availability Self-Service
- Travel & Expense ETHOS integration
- Journal Voucher Self-Service
- Approvals in Self-Service
- A/R View Fee Statement in Self-Service

And some HR/Payroll SS Apps coming

- Effort Certification – Part 1
- Communications Manager
- Salary Planner
- Time Entry
- Faculty Load and Compensation
- Campus Directory
- EPAF
- Effort Certification – Part 2

Will look for announcements at Ellucian LIVE before prioritizing

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919-843-9168