Ellucian Action Plan Update
March 12, 2015

- **Establish Leadership Teams** – We've created an Ellucian Steering Committee (composed of key leaders) and a subordinate Ellucian Super User Group (composed of our most experienced users of Ellucian products) and these groups have met and begun to implement the Action Plan recommendations. They have established the following priorities:
    - o **Retention Planning** – Includes reporting, predictive analytics, and an early alert system.
    - o **Virtual Document Management** – Enables us to control documents, share information, increase productivity, and archive securely.
    - o **Improve Security to Protect PII (Personally Identifiable Information)** – Limits access to birth dates and social security numbers to only authorized persons.
- **Implementation Services for eVisions FormFusion and Intellicheck** – Dara Fann met with Twana Jackson regarding the implementation and configuration of Form Fusion. The project was laid out, the MAPS server is updated, and the template for invoices is partially configured. Estimated time frame for implementation is early April 2015.
- **Complete the Banner XE Readiness Survey and Rollout Banner XE** -- With the recent change in personnel within the Registrar's office, we have delayed implementation of BANNER Attendance Tracking until the new Registrar indicates she is ready to proceed. Banner XE has multiple modules. It will be advantageous to begin implementing individual modules after completing the readiness survey.
- **Download and implement Ellucian Solution Manager** -- Researched this product and contacted Ellucian for clarification. As we do not host our own database this solution is not applicable.
- **DegreeWorks Refresher Training** – Dara Fann is working with Amanda Sauchuck to obtain funding as part of the BTG grant for this specific requirement.
- **Student Retention Planning** -- Our Ellucian Super Users Group selected this project as the project with the highest priority. We are working with Amanda Sauchuk to support the Bridging the Gap Grant implementation of a predictive analytics system that will provide a statewide solution to student retention planning. We are also in the process of evaluating early alert systems for purchase and implementation. We have discussed retention planning with Dr. DeSonia and Mr. Fedders and plan to meet within the next few weeks to be clarifying a plan of action to move forward.
- **Advancement to Continue Using Blackbaud Raiser's Edge** -- Online training from Blackbaud was conducted with personnel from Advancement and IT and access issues have been resolved while also auditing our accounts to remove departed personnel. Additionally, Advancement has purchased and implemented NetSpark Community software that works with Raiser's Edge to provide online donation capabilities.
- **Security Consulting and Training Services** – Dara Fann has overhauled the BANNER Forms Security permissions, classes, and groups based upon job duty specifications

from supervisors. This portion of the project was completed in December 2014. Soon we will implement network restrictions so that access to Internet Native Banner is limited to traffic originating within the New River network. This will prevent access by any individual not within our network. Self-Service BANNER will not be affected by this change. We are in the process of implementing personably identifiable information (PII) security that will restrict the viewing of birth dates and social security numbers to authorized persons.

- **Use the On-Demand Subscription Library for Ellucian Training** – The IT staff is using this training and we also purchased and provided this particular training solution for the new Registrar.

- **Join the Commons, Attend Regional Conferences, and Participate in Webinars** – We joined the Commons and are using our internal Banner User Listserv to share conference and webinar information. The result has been increased participation, particularly in free webinars.

- **BANNER Document Management Suite** – The Records Retention Committee has determined that a document management solution is required. We are beginning to gather information to evaluate available solutions to ensure they will meet our virtual document management needs and budgetary constraints. Additionally, the Ellucian Super Users Group identified this project as our second highest priority.