



GUAM COMMUNITY COLLEGE
("Client")

As of the latest signing date below, ELLUCIAN COMPANY L.P. and Client agree that the most recent underlying agreement between the parties related to licensing software, providing professional services and/or providing software support services or maintenance ("Agreement"), as applicable, will apply to the attached Order Form(s), each of which will constitute a separate and independent contract between the parties to the Order Form. "Ellucian" means, in each instance, the Ellucian entity that enters into an Order Form with Client. By the execution below, each party represents and warrants that it is bound by the signature of its respective signatory for each of the attached non-cancelable Order Form(s). Except as amended by the Order Form(s), the terms of the Agreement remain unchanged and in full force and effect; any fees due under the Order Form(s) are in addition to and not in lieu of fees already due or scheduled to come due under the Agreement. Client has not relied on the availability of either any future version of any software or any future software product or service.

The pricing contained in the attached Order Form(s) is valid only if the Execution Date occurs on or before October 5, 2018.

Ellucian

By:


Authorized Signature

Name:

Joan B. Haynes
Printed

Title:


Senior Director Contracts

Date:

October 4, 2018

Client

By:


Authorized Signature

Name:

Mary A.Y. Okada, Ed.D.
Printed

Title:

President

Date:

10.04.2018

The later date of signature above is the "Execution Date" for each of the attached Order Forms.
Client's Billing Contact Information appears below.

Client

Billing Contact Information

Name:

Guam Community College

Address:

P.O. Box 23069 GMF

City, State, Zip:

Barrigada, Guam 96921



PROFESSIONAL SERVICES ORDER FORM

ELLUCIAN COMPANY L.P.

Client Information

Client Name: **GUAM COMMUNITY COLLEGE**

Agreement

The terms and conditions stated in the most recent underlying agreement between the parties for provision of Professional Services will apply to this Professional Services Order Form ("Order Form").

Ellucian agrees to provide to Client the Professional Services identified in the table(s) below for the fees set forth in the table(s) and on the terms and conditions set forth in the Agreement as modified by this Order Form. In performing the Professional Services under this Order Form, Ellucian may use a combination of remote services, centralized services, and onsite services, using personnel worldwide. Ellucian will provide Client with the time and materials services identified in the Time and Materials Services Table below, during the period specified in that Table; for the avoidance of doubt, these are not "fixed fee" or "not to exceed" services, but rather time and materials services for which Client will pay Ellucian for Professional Services rendered at the hourly rate provided for in the Time and Materials Services Table. Ellucian will provide Client with the fixed fee services for the fees specified in the Fixed Fee Services Table below.

TIME AND MATERIALS SERVICES TABLE:

Description ¹	Estimated Hours	Hourly Rate ²	Fee ^{3,4}
Business Systems Analysis – Student Accounts Receivable Management	40	\$187	\$7,480
Business Systems Analysis – Student Enrollment Management	40	\$187	\$7,480
Business Systems Analysis – Student Curriculum Management	40	\$187	\$7,480
Business Systems Analysis – Student Registration Management	40	\$187	\$7,480
Business Systems Analysis – Student Records Management	40	\$187	\$7,480
Ellucian Analytics Essentials – Student	90	\$213	\$19,170
Ellucian Analytics Essentials – Financial Aid	48	\$213	\$10,224
Ellucian Analytics Essentials – Human Resources	48	\$213	\$10,224
Ellucian Degree Works Full Service	214	\$187	\$40,018
Ellucian Degree Works Transfer Equivalency	20	\$187	\$3,740
Ellucian Degree Works Scribing	123	\$120	\$14,760
Business Systems Analysis – Finance	40	\$187	\$7,480
Ellucian Mobile Application Edition Starter Services	73	\$187	\$13,651
Ethos Identity Tactical Planning	162	\$213	\$34,506
Ellucian Ethos Integration Services	48	\$213	\$10,224
Project Management Services	213	\$187	\$39,831
TOTAL TIME AND MATERIALS SERVICES FEE:			\$241,228

Notes to Time and Materials Services Table:

- ¹ For a more detailed description of these services, see the Statement of Work attached as Attachment A.
- ² Hourly rates specified in this table will be held in place for services rendered on this implementation project for a period beginning on the Execution Date and ending one (1) year later. Requests for any additional services beyond the one (1) year period will need to be negotiated under separate order form and signed by both parties.
- ³ Client is advised that, without limitation, Ellucian personnel rendering services bill for travel time, preparation time, and follow-up time.

- ⁴ Where a number of hours is specified in the table with an associated hourly rate, the "Fee" is a good faith estimate based on the information available to Ellucian at the time of execution of this Agreement. The total amount that Client will pay for these services (i.e., the TOTAL TIME AND MATERIALS SERVICES FEE) will vary based on the actual number of hours of services required to complete the services and the rate that is applicable during that year in which the services are rendered.

FIXED FEE SERVICES TABLE:

Description ¹	Fee (valid for 1 year)
Evisions Argos Training and Implementation (2 weeks)	\$19,600
TOTAL FIXED FEE SERVICES FEE:	\$19,600

Notes to Fixed Fee Services Table:

- ¹ For a more detailed description of these services, see the Statement of Work attached as Attachment A.

Payment Terms – Time and Materials Services: Ellucian will invoice Client monthly for all time and materials services on an as-incurred basis in arrears, and payments will be due within thirty (30) days from the date of invoice.

Payment Terms – Fixed Fee Services Table: Ellucian will invoice Client upon delivery of the fixed fee services listed in Fixed Fee Services Table A, and Client's payment will be due within thirty (30) days from the date of such invoice(s). These fixed fee services specifically exclude any responsibility on the part of Ellucian for providing any services other than those services specifically set forth above. Travel and living expenses are in addition to the Total Fixed Fee Services Fee and will be invoiced on a monthly, as provided/as incurred basis, and payment therefor will be due within thirty (30) days of the date of invoice.

Payment Terms – Expenses and Other Charges: Travel expenses and living expenses are additional. Ellucian will invoice Client monthly for such reimbursable expenses and other applicable charges on an as-incurred basis in arrears, and payments will be due within thirty (30) days from the date of invoice.

Project Assumptions

As applicable, the following assumptions will apply to Professional Services provided under this Order Form:

- Client will assign a project leader who will lead the project based on the mutually agreed-upon plan, lead the teams at the Client's site, and be the main point of contact for Ellucian throughout the implementation.
- Client will identify and provide access to the appropriate IT and application staff members to work with and assist Ellucian throughout the engagement. Client staff will have knowledge of their business area(s), provide relevant documentation, and complete preparation activities prior to all service engagements.
- Services will be provided remotely unless otherwise determined during project planning.
- Training provided by Ellucian follows a 'train-the-trainer' methodology for project teams, will be provided at a single site designated by Client for onsite training, and will limit all training and consulting sessions to no more than 12 participants per session unless otherwise stated in this Order Form.
- Client will commit to changing/modifying business processes to conform to Ellucian recommended practices and Ellucian common business process models. Client is responsible for managing staff expectations around Ellucian recommended practices for staff, faculty and students.
- Client will document processes, decisions and end user training materials unless otherwise indicated.
- Except as outlined in the Statement of Work, the development, modification, and/or completion of any rules, reports, integrations/interfaces, subroutines, and customizations is the responsibility of Client.
- Client will ensure that the software release on the Client system is up-to-date and all updates released by Ellucian have been loaded into the appropriate environments as required by the project. No major upgrades will be introduced into the environment during the course of the implementation except as agreed during project planning activities.
- Prior to the commencement of applicable services, Client will provide Ellucian access to applicable on-premise Ellucian Software, will have all necessary hardware onsite and operational, and have all required software installed, other than software to be installed by Ellucian.

- Client will provide Ellucian with access to appropriate software and functionality in compliance with Client's security and access policies and provide Ellucian access to their servers via a Virtual Private Network ("VPN") connection that is supplied by SecureLink. Client will notify Ellucian of any firewall/connection issues that could cause a delay in the delivery of the service.
- All Professional Services to be provided hereunder are based on the implementation of the Baseline version of the Ellucian Software available as of the Execution Date.
- Any tasks, deliverables or services which are not described in this Order Form are out of scope and will not be provided by Ellucian.
- Any changes or additions to the scope of the mutually agreed upon Professional Services will be managed through the Ellucian Project Manager and Client's contact through a mutually agreed upon change order process.

BANNER STUDENT SYSTEM ANALYSIS SCOPE OF WORK ("SOW")

Overview

Ellucian consultants will meet individually with key staff and decision makers to discuss current institutional practices, procedures, policies and business processes. Using Client specific information collected during the discovery sessions already conducted and higher education industry recommended practices, Ellucian will identify:

- Process improvements that can be achieved through leveraging Banner Student functionality based upon the latest releases.
- Business processes that can be improved through system re-implementation.
- Operational activities that would benefit from further training and/or consultative support.
- Areas where specific teams can work cross-functionally to implement integrated processes.

Service Description

Engagement	High Level Tasks	Deliverables
Enrollment Management	The focus of the Enrollment Management System Analysis is on the management of - Recruitment, Admissions, Transfer Articulation, Tape Load/Test Score Load, Admissions Self Service, Communication Plans, Event Management and reporting.	<ul style="list-style-type: none"> • Enrollment Management Analysis Report
Curriculum Management	The focus of the Curriculum Management System Analysis is on the management of Term processing rules (start of term and end of term), the Course Catalog, Prerequisites, the Class Schedule, Open Learning, Waitlist Set up and management, Faculty Assignment & Workload, Maintenance of Curriculum Codes and reporting.	<ul style="list-style-type: none"> • Curriculum Management Analysis Report
Registration Management	The focus of the Registration Management System Analysis is on the management of Advising, Registration Models (i.e., quick start, Open Learning Registration ("OLR"), Fee Assessment, Registration Processing (Administrative and Self Service), Withdrawals and reporting.	<ul style="list-style-type: none"> • Registration Analysis Report
Records Management	The focus of the Records Management System Analysis is on the management of General Student, Academic History, Academic Standing, Graduation Processing, Transcript Management, Transfer Articulation, and Regulatory and other reporting.	<ul style="list-style-type: none"> • Records Management Analysis Report
Accounts Receivable Management	The focus of the Accounts Receivable Management System Analysis is on following areas of Student Accounts Receivable processing: Detail Codes, Fee Assessment and Refunding, Application of Payments, Third Party Contracts and Exemptions, Billing, Unapplication of Payments, the Auto Holds process and reporting	<ul style="list-style-type: none"> • Accounts Receivable Management Analysis Report
	The System Analysis engagements are led by an Ellucian Subject Matter Expert.	

Service Assumptions

- Additional optimization hours may be recommended as follow-up based on the System Analysis.
- All sessions to be conducted remotely unless or until there is a joint agreement between the Client and Ellucian that other arrangements (i.e., onsite delivery) may be made.
- All sessions are to take place during mutually agreed upon hours, which may vary engagement to engagement and based upon the geographic location of the consultant(s) delivering the engagement (i.e., Guam is 14 hours

ahead of US Mainland Eastern Standard time; Guam is 15 hours ahead of US Mainland Central Standard time; Guam is 16 hours ahead of US Mainland Mountain Standard Time; Guam is 17 hours ahead of US Mainland Pacific Standard Time).

- Remote sessions will be at least 4 hours in duration, with appropriate breaks for refreshment and meals, and will not exceed 6 hours in any given day.
- Ellucian resources will take attendance during each day's remote sessions and will notify the Client of those attendees present and not present.
- During the interviews, the Ellucian consultants will document findings and prioritize items identified so as to determine which could be addressed first.
 - Ellucian will use a spreadsheet tool to document and track the issues identified and share that document with the Client as a working tool for both Client and Ellucian.
 - The spreadsheet will be delivered in draft form to the Client upon the completion of the work as assigned.
 - Ellucian will draft a summary of findings document which would be delivered, along with the revised spreadsheet which would include finalized prioritized recommendations, shortly after the visit is completed.
 - The Summary of Findings report will be a high-level summary which will be focused on key decisions, themes and areas of opportunity as identified during the interviews and working sessions
- The last 4-hour Client facing session will be used by Ellucian to work through elements that have been identified which can be resolved or addressed by the way of immediate improvements in configuration or process approach.
- Individual System Analysis will be scheduled separately as each requires a Subject Matter Experts (SMEs) with expertise in the respective area.

Client Responsibilities

- The Client must provide a list of all employees who are expected to participate in each remote Ellucian session. Expectations must also be provided by Client leadership to Client participants regarding attendance at, engagement with, and full participation in the discussions and session throughout the duration of the engagement is mandatory.
- The Client must ensure attendees are punctual at the start of each day's session and at the return following any break or meal time.
- Provide access for Ellucian to a current refresh of the production database to a TEST environment of Banner Student and/or Accounts Receivable for accurate assessment of rules and validations relative to configurations

Out of Scope

- In depth training for the topics discussed during the Usage Audits.
- Ellucian's recommendations may include additional consulting services if the Client is not able to address the identified activities internally.

ELLUCIAN ANALYTICS ESSENTIALS SCOPE OF WORK ("SOW")

Overview

The Ellucian Analytics Essentials Services are designed to provide the customer with a deployment of the delivered tile content to one or more selected domain. Ellucian will deploy Ellucian Analytics baseline tile content to a non-production and production environment. Ellucian will lead the customer through the data validation process and provide administrator and end user training.

Service Description

Ellucian will deploy Ellucian Analytics baseline tile content to 1 non-production environment and 1 production environment for the following domain(s):

- Banner Student
- Banner Financial Aid
- Banner Human Resources

Engagement	High Level Tasks	Deliverables
Planning	<ul style="list-style-type: none"> • Ellucian Analytics functionality overview; • Review delivered tile content; and • Identify user types, parameters and job scheduling. 	<ul style="list-style-type: none"> • Engagement Agenda • Engagement Report • Decision Workbook
Deployment	<p>The following activities will be completed in both non-production and production environments:</p> <ul style="list-style-type: none"> • Configure Ellucian Analytics for Ethos Integration; • Provision users (up to 25); • Configure parameters and jobs; and • Load and validate data. 	<ul style="list-style-type: none"> • Data loaded and validated in Data Access • Data loaded and validated in Ellucian Analytics • Engagement Report
Training	<p>Ellucian Analytics Fundamentals Training for selected domain</p> <ul style="list-style-type: none"> • Introduction to Ellucian Analytics • Ellucian Analytics Overview • Analytical Tile Interaction <p>Ellucian Analytics Design User Training for selected domain</p> <ul style="list-style-type: none"> • Tableau Web Overview • Navigating the Tableau Web Editor • Using Ellucian Analytics Student Templates to Create New Visualizations 	<ul style="list-style-type: none"> • Workbook • Engagement Report
Turnover	<ul style="list-style-type: none"> • Ellucian Analytics deployment overview; and • Plan next steps. 	<ul style="list-style-type: none"> • Engagement Report

Included On Demand Subscription Library courses:

- Ellucian Analytics Overview
- Ellucian Analytics Tile Navigation
- Ellucian Analytics Administration

Service Assumptions for Ellucian Analytics services

- Client Ethos Integration Tenant configured to the authoritative source where Ellucian Ethos Data Model mappings are complete.
- Ellucian Analytics requires the latest certified compatible combination of the following components:
 - Banner Ethos API DB Upgrade
 - Banner DB Upgrade
 - Banner General
 - Banner Student
 - Banner Accounts Receivable (for customers using Banner AR)
 - Banner Finance (for customers using Banner Finance)
 - Banner Financial Aid (for customers using Banner Financial Aid)
 - Banner Payroll (for customers using Banner Payroll)
 - Banner Position Control (for customers using Banner Position Control)
 - Banner Student API with SSL configuration with a certificate from a well-known certificate authority
 - Banner Integration API with SSL configuration with a certificate from a well-known certificate authority
 - Banner Event Publisher

Client Responsibilities for Ellucian Analytics services

- Client will test retrieval of at least one ERP record through Ethos Integration. This may be completed by executing an API call against Ethos Integration that successfully retrieves at least 1 course record from ERP or another mutually agreed transaction.

Out of Scope for Ellucian Analytics services

- Ellucian Analytics custom or modified tile content

DEGREE WORKS APPLICATION HOSTING (AHS) SCOPE OF WORK ("SOW")**Service Description**

Engagement	High Level Tasks	Deliverables
Environment Setup (remote)	Ellucian will verify settings and run several processes to populate data elements prior to the start of the implementation activities.	<ul style="list-style-type: none">• Engagement Report
Introduction and Scribe Readiness Call (remote)	<p>The purpose of the Degree Works introduction and Scribe Readiness Call is to give the project team an overview of the Degree Works implementation. Topics and documents reviewed will consist of:</p> <ul style="list-style-type: none">• Degree Works implementation overview;• Degree Works team roles and responsibilities;• Catalog authentication (if needed);• Which catalog year requirements to scribe; and• Scribe kickoff worksheet.	<ul style="list-style-type: none">• Degree Works Implementation Overview• Degree Works Team Roles and Responsibilities• Scribe Kickoff Worksheet
Decision Planning Visit (remote)	<p>The purpose of the engagement is threefold. The first day's emphasis is client focused. The Client's unique circumstances, goals, and concerns will be discussed in detail. On the second day, the emphasis is on introducing the Degree Works system and exploring its basic functionality. This understanding will serve as the basis for important configuration and implementation decisions that follow. The focus of the third day is on the implementation plan. Each component of the Degree Works implementation is discussed in detail with a particular emphasis on the Client's specific requirements and constraints.</p> <p>Engagement objectives:</p> <ul style="list-style-type: none">• Meet the Degree Works Core Team members and Ellucian;• Understand the Degree Works features including web functionality;• Identify the basic terminology of the Degree Works system;• Describe the Degree Works process flow;• Identify recommended practices in a Degree Works implementation;• Identify the specific implementation approach for the Client; and• Identify document implementation requirements and unique configuration/service considerations for the Client.	<ul style="list-style-type: none">• Meeting Agenda
Scribe Services (remote)	The purpose of the Degree Works Scribe Service is to complete the initial coding of degree requirements for the Client's degree programs. The blocks of code are delivered into the Degree Works test database. If the scope of the engagement includes additional scribe services for past or future catalogs,	<ul style="list-style-type: none">• Engagement Report

Engagement	High Level Tasks	Deliverables
	<p>this initial code, once verified by the Client, becomes the base for the building of additional scribing.</p> <p>Ellucian will interact with participants who have been identified during the Degree Works Introduction and Scribe Readiness Call via email, conference calls, and WebEx sessions as needed to clarify degree requirements. All non-written interaction will be followed up with documentation for clear and efficient communication of discussion and decisions.</p> <p>Engagement Objectives:</p> <ul style="list-style-type: none"> • Complete a comprehensive analysis of authenticated degree requirements • Scribe requirements to test database <p>Breakdown of Scribe counts for the Undergraduate catalog:</p> <ul style="list-style-type: none"> • Degrees: 4 (Associates, Certificates, Industry Certifications/Apprenticeship, and Adult High School Diplomas) • Majors: 23 (Associate Degrees) (do we double this number for double majors?) <i>WJP</i> <i>JBH</i> • Minors: 0 • Certificate/Endorsement Programs: 33 (Certificate programs, Industry Certifications, Adult High School) • Options: 0 • Emphasis/Focus: 2 (Automotive) • Concentration: 6 • Tracks: 2 • Specialization: 0 • General Education Blocks: 6 (English Composition, Mathematics, Computer Literacy, Social and Behavioral Sciences, Humanities and Fine Arts, and Natural and Physical Science) 	
<p>Technical Training I (remote)</p>	<p>The purpose of the Degree Works technical training is to introduce and examine the Degree Works system and its technical components. This examination will consist of a demonstration of the Degree Works system. This training will also include a discussion of the setup, configuration, data extraction, and management of the Degree Works system. Finally the examination will include a discussion of recommended practices, project management, and tools for the Degree Works implementation.</p> <p>Engagement objectives:</p> <ul style="list-style-type: none"> • Meet the Degree Works Project Team members and the Ellucian consultants; • Understand the Degree Works features consisting of web functionality and the PC tools; • Identify the basic terminology of the Degree Works system; • Define the Degree Works implementation project management procedures; 	<ul style="list-style-type: none"> • Training Agenda • Training Materials (PDF format)

Engagement	High Level Tasks	Deliverables
	<ul style="list-style-type: none"> • Describe the system architecture; • Describe the Degree Works process flow; • Define the extract process and describe how this process relates to the SIS configuration; • Understand the configuration settings in the UCX tables; • Set up staff ID files and extract staff data from the SIS into Degree Works; • Extract sample student data from the SIS into Degree Works; • Attempt a trial run of the student extract from SIS to Degree Works; • Describe and discuss nightly SQL extract scripts; • Identify web design requirements of Degree Works web pages; • Describe system management requirements including the setup of nightly cron job requirements and the description of log files; • Describe and explain troubleshooting techniques 	
Functional Training I (remote)	<p>The purpose of the Degree Works Functional Training I is to:</p> <ul style="list-style-type: none"> • Understand the Degree Works System, Data Structures, Functional Applications and Student Records System, and Data Requirements. • Focus on administrative tools: Scribe, Sure Code and Transit; emphasizing navigation, functionality, and features. • Introduce the Degree Works Web Audit worksheets, emphasizing Student View, Student Data Report, and What If audit. • Learn to use these products and functionality through full hands on training, and prepare for Scribe Block Review and Functional Web Review. <p>This session is designed to enable the participants to demonstrate, through hands-on exercises, the knowledge and understanding of the Degree Works system functional applications and data requirements. This will consist of using pc applications and the internet. Participants will receive full hands on training during this visit.</p> <p>The lecture and hands-on workshop(s) will cover the following:</p> <ul style="list-style-type: none"> • Demonstrated ability to navigate in Scribe and to scribe basic and semi-complex requirements, and update existing requirement Blocks. • Demonstrated awareness of how to troubleshoot student data issues, using Student Data View, and understand their application to course requirements on the Web. • Demonstrated ability to use Sure Code to edit, delete or add codes and flags to UCX tables. • Demonstrated ability to use What If and Student View Audits to look at the display of scribed logic and wording. • Demonstrated ability to run administrative scripts via Transit. 	<ul style="list-style-type: none"> • Training Agenda • Training Materials (PDF format)

Engagement	High Level Tasks	Deliverables
	<ul style="list-style-type: none"> Demonstrated ability to use Ellucian Degree Works documentation. 	
Functional Training II (remote)	<p>This session is designed to introduce additional functionality on the Web, begin building the localization roadmap and requirements of the Degree Works system. A strong focus will be placed on an in-depth understanding of student information system data and its relationships to Degree Works and the placement of courses in the Degree Audits.</p> <p>The purpose of the Degree Works Functional Training II consists of:</p> <ul style="list-style-type: none"> Defining web design changes, Exception Processing and Other functionality of the Web, Continuation of Web and Scribe Review Focusing on PC Tool: Transit; emphasizing navigation, functionality, and features 	<ul style="list-style-type: none"> Training Agenda Training Materials (PDF format)
Web Design Service	<p>The purpose of this engagement is to provide the Client with site-specific web design changes to alter the look-and-feel of the web application and audit worksheets. We will work with the Client to create a list of requested changes, which will be prioritized and completed by Ellucian. The service also consists of testing of the web changes.</p>	<ul style="list-style-type: none"> Engagement Report
Functional Training III (remote)	<p>This session is designed to enable participants to set up user access permissions, and make sure the staff is ready to proceed to rolling out Degree Works to the campus community. Web design changes and User Roles set-up will be finalized, sample end to end scenarios will be tested with different user logons.</p> <p>Engagement Objectives:</p> <ul style="list-style-type: none"> All users will have appropriate permissions Internal Training plan for each user class will be evaluated 	<ul style="list-style-type: none"> Training Agenda Training Materials (PDF format) Go live checklist
Student Educational Planner Training (remote)	<p>The purpose of the Degree Works Student Educational Planner session is to:</p> <ul style="list-style-type: none"> Understand the Degree Works Student Educational Planner (SEP) System, Data Structures, Functional Applications and Student Records System, and Data Requirements Focus on Web tools for building Plans and Templates for Program Plans. Consists of working with multiple applications within Degree Management Learn to use these products and functionality through full hands on training Define new business processes where needed. This will encourage accurate data entry. By having accurate data entry in Plans and Templates, curriculum planning reporting can be used as desired <p>The purpose of this training session is to develop competence working with the Student Educational Plan application and its related tables. It is our goal that the Client will roll out the application to selected departments or campus-wide within a</p>	<ul style="list-style-type: none"> Training Agenda Training Materials (PDF format)

Engagement	High Level Tasks	Deliverables
	reasonable amount of time after the consulting session has completed.	
Functional Training IV (remote)	<p>This session is designed to enable participants to conduct a go-live checklist evaluation, and make sure the staff is ready to proceed to rolling out Degree Works to the campus community. The cut-over plan of moving from implementation to an installed client will be reviewed.</p> <p>Engagement Objectives:</p> <ul style="list-style-type: none"> All users will have appropriate permissions The "go-live" checklist will indicate the status of all critical components Software Cut-Over plan will be evaluated Internal Training plan for each user class will be evaluated 	<ul style="list-style-type: none"> Training Agenda Training Materials (PDF format) Go live checklist
Technical Training II (remote)	<p>The purpose of this engagement is to provide the Client with a review of key technical topics familiarity with which will be essential to support a successful go-live.</p> <p>These topics consist of:</p> <ul style="list-style-type: none"> Degree Works architecture Tuning User access/authorization Degree Works environment management Reapplying web design changes after an upgrade Go-live checklist CPA reporting <p>Engagement objectives:</p> <ul style="list-style-type: none"> Demonstrated understanding of key technical topics; Completion of go-live checklist; and Client confidence in the ability to manage the Degree Works technical environment in support of and following go-live. 	<ul style="list-style-type: none"> Training Agenda Go-live Checklist
Remote Consulting	General consulting to support Client issues such as scribe and audit issues and troubleshoot results of Client audit review process, provide data extract assistance, and host conference calls as needed between trainings.	

Service Assumptions

- Deviation from the catalog year and/or number of scribe blocks estimated may require an adjustment to the number of scribe hours required.
- The Client's authenticated source documentation may include the published catalog/bulletin, advisor audit worksheets, etc. Scribe documentation should:
 - Be delivered in electronic format (e.g. Work document, PDF, etc.), and be validated;
 - Use a clear, concise format to ensure scribing is complete and accurate; and
 - Contain course lists rather than narrative text.

Client Responsibilities

- Provide the infrastructure to support the software (e.g., servers, personal computers and network, Oracle database);
- Provide design requirements for web design changes;

- Provide appropriate campus resources as outlined in the Degree Works Campus Team Roles and Responsibilities document;
- Complete the functional review process in the timeline delineated in the project plan;
- Provide any site-specific modifications to the baseline native bridge that may be desired to accommodate business processes or student data practices;
- Provide adequate training facilities during the implementation;
- Process any required business practice changes; and
- Test the Degree Works system for accuracy.

Out of Scope

- Scribing for Pre-requisites, Financial Aid, Athletic Eligibility, and Service Opportunity College audits is not included in this scope of work. If the Client wishes these services to be included a separate scope of work and work order can be created.

DEGREE WORKS TRANSFER EQUIVALENCY SELF-SERVICE IMPLEMENTATION ECRM SCOPE OF WORK ("SOW")

Overview

Ellucian provides implementation support for Degree Works Transfer Equivalency in 2 key areas: functional and installation. Guided by the Ellucian implementation approach, consultants in each of these areas work collaboratively with the Client and with each other to ensure that Degree Works Transfer Equivalency is optimally configured to meet the Client's objectives.

During the Define and Design Phases, Ellucian will work with the Client to establish the basic system infrastructure and confirm the general scope of the implementation services. Activities during this phase consist of: establishing the project plan and project team; confirming resources and facilities at the Client's site; and ordering the technical system such as hardware and third party software. Ellucian will advise the Client on the authentication process as well as any business practices that need to be modified. The Client is responsible for installing and configuring the hardware, operating system, and database, and Ellucian is responsible for installing the Degree Works Transfer Equivalency Software.

During the Configure and Test Phases, Ellucian will train Client's implementation team on the extract, configuration, and maintenance of the Degree Works Transfer Equivalency solution. Ellucian will provide user interface training to Client's project team.

Service Description

Engagement	High Level Tasks	Deliverables
Software Installation	Ellucian will install the Degree Works Transfer Equivalency system on Client's computer system, located at Client's site.	
Introduction and Prep Call	<p>The purpose of the introduction and prep call is to give the potential project team members to an overview of the Degree Works Transfer Equivalency implementation. This will consist of walking through several documents and templates provided by Ellucian to assist in the implementation.</p> <p>Topics and documents reviewed to consist of:</p> <ul style="list-style-type: none"> • Degree Works Transfer Equivalency Implementation Overview; and • Team roles and responsibilities. 	<ul style="list-style-type: none"> • Degree Works Transfer Equivalency Implementation Overview • Team Roles and Responsibilities
Transfer Equivalency Self Service Configuration	The purpose of the engagement is to introduce and examine the Degree Works Transfer Equivalency system and its components. This examination will consist of a demonstration of the Degree Works system. This training will also contain discussion of the setup, configuration, data extraction, and	<ul style="list-style-type: none"> • Training Agenda • Training Materials (PDF format)

Engagement	High Level Tasks	Deliverables
	<p>management of the Degree Works Transfer Equivalency system.</p> <p>Engagement objectives contain the following:</p> <ul style="list-style-type: none"> • Meeting the Project Team members and the Ellucian Degree Works functional consultant; • Understanding the Degree Works Transfer Equivalency features including web functionality; • Identifying the basic terminology of the Degree Works Transfer Equivalency system; • Defining the articulation mapping extract process and describe how this process relates to the Self-Service configuration; • Understanding the configuration settings in the UCX tables; and • Extracting articulation mapping data from the SIS into Degree Works. 	
Transfer Equivalency Self Service User Interface Training	<p>This session is designed to introduce participants to the Transfer Equivalency Self-Service web interface, including basic navigation and sign-in options.</p> <p>Engagement objectives include the following:</p> <ul style="list-style-type: none"> • Demonstrated ability to navigate the Transfer Equivalency Self-Service web application 	<ul style="list-style-type: none"> • Training Agenda • Training Materials (PDF format)
Engagement Report	Engagement Report, provided after the conclusion of the Transfer Equivalency service, summarizing the objectives and accomplishments of the sessions, relevant issues to be addressed, and tasks to be completed.	<ul style="list-style-type: none"> • Engagement Report

Service Assumptions

- Transfer articulation mapping records are complete, correct, and reside in the Client's SIS.
- Client has licensed the following Ellucian Baseline Component Systems: Degree Works and Transfer Equivalency Admin.

Client Responsibilities

- Provide the infrastructure to support the software (e.g., servers, personal computers and network, Oracle database);
- Provide appropriate campus resources as outlined in the Degree Works Campus Team Roles and Responsibilities document;
- Client's expert teams will participate in all training and consulting sessions. Client's expert teams will review existing policies and procedures and begin to develop new procedures as appropriate. Each member of the team will review the information contained in the training documentation and the supplied training materials which explains the functionality of the Baseline Transfer Equivalency Admin Component System. These teams must complete all testing, validation, rule, and process development required for production system operations in their respective areas of specialization;
- Provide any changes to the look-and-feel of the Self-Service application;
- Client will be responsible for taking the Baseline Transfer Equivalency Self-Service Component System into a live production environment and, in this regard, will make the determination as to the appropriate time frame for this undertaking;
- Process any required business practice changes; and
- Test the Degree Works Transfer Equivalency system for accuracy.

BANNER FINANCE SYSTEM ANALYSIS SCOPE OF WORK ("SOW")

Overview

Ellucian will meet with key staff and decision makers to discuss current Client practices, procedures, policies and business processes. A planning call will be scheduled and a questionnaire about current practices will be sent to Client. Using this completed questionnaire, additional University specific information collected during the discovery sessions already conducted and higher education industry recommended practices, Ellucian will identify:

- Process improvements that can be achieved through leveraging Banner Finance functionality based upon the latest releases;
- Business processes that can be improved through system re-implementation;
- Operational activities that would benefit from further training and/or consultative support; and
- Areas where specific teams can work cross-functionally to implement integrated processes.

Service Description

Engagement	High Level Tasks	Deliverables
Finance System Analysis	<p>The Finance System Analysis will focus on the core functions identified below:</p> <ul style="list-style-type: none">• Accounts Payable• Electronic Approvals• Finance Self-Service• General Ledger• Interfaces• Purchasing• Reporting• Rules and Security <p>The Client may add 1 additional topic from the additional functions listed below:</p> <ul style="list-style-type: none">• Budget Development• Non-Student Accounts Receivable• Purchase Card <p>The System Analysis is lead by an Ellucian Subject Matter Expert.</p>	System Analysis with an Executive Summary and Recommendations

Service Assumptions

- Additional optimization hours may be recommended as follow-up based on the System Analysis
- The service engagement will be a joint effort between Ellucian and Client staff.
- All sessions to be conducted remotely unless or until there is a joint agreement between the University and Ellucian that other arrangements (i.e., onsite delivery) may be made.
- All sessions are to take place during mutually agreed upon hours, which may vary engagement to engagement and based upon the geographic location of the consultant(s) delivering the engagement (i.e., Guam is 14 hours ahead of US Mainland Eastern Standard time; Guam is 15 hours ahead of US Mainland Central Standard time; Guam is 16 hours ahead of US Mainland Mountain Standard Time; Guam is 17 hours ahead of US Mainland Central Standard Time).
- Remote sessions will be at least 4 hours in duration, with appropriate breaks for refreshment and meals, and will last no more than 6 hours in any given day.
- The last 2 hours of the client facing sessions may be reserved for the Ellucian to work through elements which can be easily resolved by the way of improvements in configuration and/or processes.
- Ellucian resources will take attendance during each day's remote sessions and will notify the University of those attendees present and not present.

- At the conclusion of the client facing sessions, Ellucian will summarize the findings and recommendations with the Client to:
 - Prioritize the items identified to provide a suggested sequence of addressing the recommendations.
 - Provide a preliminary working tool for both Client and Ellucian.
- After the conclusion of the System Analysis client facing engagements, Ellucian will deliver the System Analysis write-up. The Final System Analysis will contain:
 - An executive-level summary which will be focused on key decisions, themes and areas of opportunity, and the recommendations agreed upon;
 - A more detailed review of the challenges of the current practices, the recommended practices with benefits gained by the new approach, an estimated level of effort required, and a relative priority of each recommendation; and
 - List of participants included in the engagement.

Client Responsibilities

- The client must provide a list of all employees who are expected to participate in each remote Ellucian session. Expectations must also be articulated by University leadership to University participants regarding attendance at, engagement with, and full participation in the discussions and session throughout the duration of the engagement.
- The client must provide written direction to all University employees who are expected to participate that their attendance in all sessions for their area are mandatory.
- The client must ensure attendees are punctual at the start of each day's session and at the return following any break or meal time.
- Current refresh of the Production database to a non-production environment of Banner Finance for accurate assessment of rules and validations relative to configurations activities
- Provide Ellucian with access to the non-production environment of Banner

Out of Scope

- In depth training for the topics discussed during the System Analysis
 - Ellucian's recommendations may include consulting services if the Client is not prepared to address internally.
- Ellucian will not provide complex setup recommendations during the engagement due to time constraints.

ELLUCIAN® MOBILE PLATFORM EDITION FOUNDATION SERVICES SCOPE OF WORK ("SOW")

Overview

The Ellucian Mobile Foundation Services are designed to provide a Client branded version of Ellucian Mobile within the Client's non-production and production environment, as well as a published application the Apple App Store, and Google Play.

Service Description

Engagement	High Level Tasks	Deliverables
Project Initiation	Review project and expectations (technical and functional consultant both attend 1-hour call with Project Manager)	<ul style="list-style-type: none"> • Engagement Agenda
Ellucian Mobile Discovery and Planning	<ul style="list-style-type: none"> • Partner with the Client to determine an Ellucian Mobile implementation strategy by reviewing Ellucian Mobile capabilities and functionalities and aligning them with the Client's goals and objectives; • Develop a strategy for the implementation of security roles and permissions of each Ellucian Mobile Module; and • Tailor the Ellucian Mobile Design branding, menu configuration, layout of content and navigation. 	<ul style="list-style-type: none"> • Engagement Agenda • Decision Workbook • Engagement Report

Engagement	High Level Tasks	Deliverables
	<p>Specific objectives consist of:</p> <ul style="list-style-type: none"> • Project goals & objectives; • System Education (review functionality and related decision points); • Discovery (Decision Workbook documentation); and • Design Planning (information design, menu configuration, mobile app navigation). 	
Ellucian Mobile Readiness Review and Planning Service	<p>Ellucian will provide Client with a remote readiness review and planning session to provide information about Ellucian's Ellucian Mobile, Ellucian Mobile Services, and Implementation and deployment of Ellucian Mobile.</p> <p>Ellucian will provide Client with a Service Preparation Document ("SPD"); a checklist to verify the Client's environment meets the requirements for Ellucian Mobile, and provides valuable information to Ellucian delivering the services.</p>	<ul style="list-style-type: none"> • SPD
Ellucian Mobile Provisioning and Configuration Service	<p>Services consist of:</p> <ul style="list-style-type: none"> • 1 Ellucian Mobile server components into the non-production environment; and • 1 Ellucian Mobile server components into the production environment. • • Ellucian will pre-configure Ellucian Mobile on Client's behalf with the Client's branding. This consists of: • Applying appropriately scaled image of Client's logo (or Client's image of choosing) as the Ellucian Mobile application logo, for iPhone this consists of updating the splash/load screen. For both Android and iPhone this consists of applying Client's provided icon images; • Configuring the Ellucian Mobile application institution selection to be hardcoded directly against the Client's cloud configuration; • Deploying a test application to the Client's internal environment; and • Deploying the Client's branded production ready application in the Apple App Store, and Google Play. • <p>In addition, Ellucian will provide the initial configuration of Ellucian Mobile Cloud for the Client. This consists of setting up the following cloud configuration sections:</p> <ul style="list-style-type: none"> • Getting Started section (Mobile Server Key, and Mobile Server URL); • General section (Database Configuration); and • Appearance/About sections (Colors/Splash Logo/About). 	<ul style="list-style-type: none"> • Mobile configuration • Checklist document • Engagement Report
Ellucian Mobile Training	The Ellucian Mobile Foundation Service provides an overview of Ellucian Mobile components and an overview on the cloud configuration utility.	
Ellucian Mobile Application Configuration	<p>Review and document modifications to the design and configure Ellucian Mobile per agreed upon specifications as defined during the Ellucian Mobile discovery and planning engagement. Specific objectives consist of:</p> <ul style="list-style-type: none"> • Document and review design modifications; and 	<ul style="list-style-type: none"> • Configured Mobile Application • Updated Decision Workbook

Engagement	High Level Tasks	Deliverables
	<ul style="list-style-type: none"> Configure Ellucian Mobile as per agreed upon specifications. 	
Ellucian Mobile Go-live Planning	<p>Ellucian will work to design and document a go-live adoption strategy including how to market Ellucian Mobile and to teach end users the ease of use along with the benefits of Ellucian Mobile to encourage user adoption. The goal of this engagement is to create a roll-out plan to encourage a high level of downloads, regular use, student engagement, and retention.</p> <p>Review integration features with analytic tools such as Google analytics to review the metrics which confirm the ability to monitor key ROI metrics. Specific objectives consist of:</p> <ul style="list-style-type: none"> Creating a go-live adoption plan (marketing and support); Planning for engagement and retention; and Determining analytics metrics. 	<ul style="list-style-type: none"> Engagement Report

Service Assumptions for Mobile Platform Edition Foundation services

- Ellucian Mobile authentication will be configured via the Student Information System (SIS) native authentication method and can be configured via LDAP/AD as part of the standard service offering.

Client Responsibilities for Mobile Platform Edition Foundation services

- Prior to the commencement of Ellucian Mobile Foundation Services, Client must obtain (or have obtained) a valid license for Ellucian Mobile Foundation edition from Ellucian to use Ellucian Mobile.
- Client will provide remote access to Ellucian's technical consultant to the non-production and production server environment designated for the Ellucian Mobile Service activities, including system administrative privileges.
- Client is responsible to confirm that the prerequisites described below are satisfied.
- Coordinate with Ellucian to determine expectations and timeline.
- Client will provide properly scaled images as outlined in the SPD; and
- Client will provide hexadecimal Red Green Blue ("RGB") color values for the application as outlined in the SPD.

Out of Scope for Mobile Platform Edition Foundation services

- Banner MEP Clients
- Ellucian will use its development keys for the deployment of the application to the Apple App Store and Google Play. Optionally, Ellucian will utilize Client's keys by request.
- Ellucian will install the mobile components. It is up to the Client to test and validate Mobile and the ERP to make use of the mobile features such as registration.

IDENTITY TACTICAL PLANNING SCOPE OF WORK ("SOW")

Service Description

Engagement	High Level Tasks	Deliverables
Project Initiation and Workshop Service Preparation	Project Initiation meeting, identity tactical workshop planning service preparation, and preparation for onsite tactical planning workshop.	
Tactical Planning Workshop (Remote)	The purpose of the Identity Tactical Planning Service is to align the Client's short-term tactical plan to the long-term vision by performing a tactical architecture and planning session, and to create an identity management implementation roadmap. This session will analyze the current state architecture and also educate the Client about the products, services and	<ul style="list-style-type: none"> Engagement Agenda

Engagement	High Level Tasks	Deliverables
	architecture surrounding the Banner ERP and Ellucian solutions. Based on the strategy, a future state architecture and a project plan to realize the identity goals will be developed.	
Service Deliverable Preparation	Development of the tactical plan material and presentation.	<ul style="list-style-type: none"> Identity Management Implementation Roadmap
Service Deliverable Presentation and Follow-up	Delivery of the tactical plan outlining the Identity and Access Management (IAM) process flows and the IAM architecture. presentation to allow for Q&A.	<ul style="list-style-type: none"> Tactical Plan

Client Responsibilities for Identity Tactical Planning

- Facilitate room logistics and invitation of participants.
- Identify and schedule participants for service.
- Circulate Ellucian materials in advance of the service.
- Work with Ellucian to determine service expectations and timeline.
- Documentation of current state of customer identity environment.
- Optionally provide input on desired state of identity environment.

Out of Scope for Identity Tactical Planning

- No technical delivery will happen as part of this service

ETHOS INTEGRATION ESSENTIALS SCOPE OF WORK ("SOW")

Service Description

Engagement	High Level Tasks	Deliverables
Planning and Turnover	Technical kickoff, service preparation call, service readiness validation, and training for Ethos Integration and Ellucian ERP Middleware component installation.	<ul style="list-style-type: none"> Planning Call Engagement Agenda Service Preparation Document Training Materials Engagement Report
Ethos Integration – Functional Integration	Configure the Ellucian ERP in preparation for the Ethos Integration Implementation. Configure Ellucian Ethos Data Model mappings.	<ul style="list-style-type: none"> Decision Workbook Configured Mappings
Ethos Integration - Technical Integration	Ellucian will: <ul style="list-style-type: none"> Deploy or upgrade the Ellucian Messaging Adapter to the latest supported version; and Configure the Ellucian ERP for the integration required for the Ethos Integration implementation. Ellucian will configure the Client Ethos Integration Tenant to the authoritative source (Ellucian ERP). 	
Ethos Integration – Technical Validation	Ethos Integration message flow validation from Ethos Integration to the Ellucian ERP and validation from the Ellucian ERP to Ethos Integration.	<ul style="list-style-type: none"> Validate 1 non-production environment Installation Report

Client Responsibilities

- Develop and deliver test plan; and

- Provide test data entered to the designated non-production environment per the test plan.
- Provide Access to ellucian.okta.com with Ethos Integration Icon and (Data Access if client is getting Analytics)
- Request and approve the following in a mutually agreed upon timeline:
Ellucian Ethos Integration Requirements (Banner)
 - Banner Student API
 - Banner Integration API
 - Banner Common Database Upgrade
 - Banner Ethos API DB Upgrade
 - SSL configuration (needs to support TLS 1.2) with a certificate from a well-known certificate authority for the Banner Student API
 - SSL configuration (needs to support TLS 1.2) with a certificate from a well-known certificate authority for the Banner Integration API
 - Ellucian Messaging Service
 - Banner Events Publisher

EVISIONS ARGOS TRAINING AND IMPLEMENTATION SCOPE OF WORK ("SOW")

Overview

Ellucian's training services for Argos have been constructed to aid attendees in the development of skills pertinent to their role and responsibilities. During the Argos training services, attendees will:

- Be introduced to the features and capabilities of Argos;
- Receive hands-on training covering report and DataBlock development;
- Learn recommended practices for reporting with Argos; and
- Review Administration and configuration of the Argos Environment.

Service Description

Engagement	High Level Tasks	Deliverables
MAPS Configuration and Security	Prior to the first week of training, Ellucian will facilitate a session with the Client to review the Evisions Argos environment and confirm the environment has been properly installed and configured. This session will also include a discussion of the security options available within Evisions Argos.	<ul style="list-style-type: none"> • Engagement Agenda
Argos Training	During this remote engagement, attendees will participate in the following sessions: <ul style="list-style-type: none"> • Argos Demonstration • Report Specification Workshop (Part 1) • DataBlock Designer Training • DataBlock Designer Trainer Facilitated Lab 	<ul style="list-style-type: none"> • Engagement Agenda • Training Materials (PDF format) • Engagement Report

Service Assumptions

- Any DataBlocks or reports created during the delivery of these services are provided as-is with no ongoing maintenance or support.
- Project Management Services included separately.

Client Responsibilities

- Contain data sufficient to support the services outlined herein.
- Collect report descriptions (report examples, outlines, etc) and report specifications for use during the DataBlock Designer and DataBlock Designer Trainer Facilitated Lab.

Out of Scope

- Technical or administrative tasks, including, but not limited to, application upgrades, patches, tuning, and monitoring;
- Data source training or consulting;

- Customization or extension of the BPRA environment; and
- Custom DataBlock or report development.

PROJECT MANAGEMENT SCOPE OF SERVICE

Service Overview

Ellucian will provide project management services to Client using Ellucian's Implementation Methodology. Ellucian's implementation methodology is executed in four phases: Initiation Phase, Planning Phase, Execution Phase, and Transition & Close Phase. The four phases of Ellucian's implementation methodology, combined with monitor and control procedures, provide the structure for the overall project, helping the project management team monitor and control expectations, budget, communication, and quality.

Service Description

The following activities, artifacts, and outcomes are considered in scope for project management services:

- Project initiation; Introduction of delivery management team
- Project planning and resource management
- Initial Development of Project Charter or Scope Statement
- Project internal repository for project artifacts
- Ellucian internal project initiation meeting; Client project planning session
- Work with client project management team to manage:
 - Project execution; Project team
 - Communications (status meetings, status reports); Stakeholder expectations
 - Quality assurance activities
 - Issue tracking; Project risk response plans
 - Changes to scope, schedule, resources, and costs
 - Project financials (budgets, project reconciliation)
 - Knowledge resources; Delivery of solution artifacts
 - Delivery to contract and project scope with client acceptance
 - Transition planning; Project closure

Client Responsibilities:

- Client will provide a full-time project leader or functional leader who will work directly with the Ellucian project manager and provide the required input and work product to support project activities, artifacts, and outcomes.
- Client will assign Client resources to complete Client tasks required as part of the project's schedule.
- Client will provide information to Ellucian project team that will contribute to project activities and development of artifacts.
- Client will provide approval on all project activities, artifacts, and outcomes based on the agreed sign-off criteria and client acceptance period for approval.
- Client will attend and participate in project status meetings as defined by the Ellucian project manager and Client project leader.
- Client will provide timely approval of project change requests prior to the start of the project change.
- Client will support and otherwise cooperate with Ellucian throughout all project activities, development of artifacts, and project outcomes.